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Managing universities in transition
moving from traditional classroom-based delivery to blended and
distance learning approaches

Thesis in fulfilment of requirements for the Doctorate of Education (EdD)

Sally Anderson

Student Number M7232781

Submitted on 23 September 2005

S. Anderson
M7232781

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S. Anderson
M7232781

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Doctorate in Education

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Abstract

This thesis reports on a research study undertaken to develop an understanding of the extent to which universities in the UK are embracing the ideas of distance and blended learning and how they are changing their management and planning processes to facilitate this.

The contribution of this thesis is to develop a framework for UK universities wanting to embrace blended learning to anticipate and manage strategic stumbling blocks. A key factor in developing such a framework has been the integration of some of the ideas on management in the distance learning literature, with that of the models developed in the literature in more traditional university settings. In their turn, these ideas are combined with management literature from outwith the education arena.

The study is presented as a number of different case studies, allowing comparison of the different drivers and goals in institutions for blended learning initiatives, their chosen strategies and outcomes. The way in which these changes interrelate with the institutions' cultures, structures and management styles are demonstrated and some of the institutional implications are shown through detailed interpretation of interview data. A thematic analysis of the data is also presented.

Finally, a model is developed to provide a framework for the organisational development of higher education institutions (HEIs) which will help to manage change initiatives such as the introduction of blended learning, or explain difficulties in introducing institutional change.

S. Anderson
M7232781

S. Anderson
M7232781

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S. Anderson
M7232781

S. Anderson
M7232781

Chapter 1: Introduction

Pilot study

In 2001, a pilot study was undertaken with a view to providing a better understanding of how an institution will function within its environment and how it will go about dealing with change, particularly that of the introduction of distance or blended learning.

More specifically, the research question posed for the pilot study was:

What combination of management structure, style and institutional culture best facilitates a shift towards distance learning on a mass scale?

The combination of these factors has emerged as important in determining the success of distance learning initiatives. Information from other universities (Athabasca University (Abrioux 2003) and the University of Southern Queensland (Taylor 2003)) confirm the importance of institutional structure as a key focus for a cultural shift towards distance or blended learning. Clarke, quoted in Morrison (1998, p. 156) states that an important message for change is 'the need to build on a "tripod" of appropriate structure, culture and processes'.

The pilot study used the following ideas, drawn from the literature, as a basis:

- for structure, the most well-known ones, hierarchical structures and matrix structures (Mintzberg 1979; Mullins 1993)
- for management culture, the bureaucratic (Mintzberg and Quinn 1988, Weber 1947), collegial (Noble and Pym 1970, Becher 1989, Bush 1995) or professional bureaucracy (Mintzberg and Quinn 1988), ambiguous

(also called organised anarchies) (Cohen and March 1974) and political models (Baldrige 1971);

- for leadership styles, the most important were empirical/rational; normative/re-educative and power/coercive (Chin and Benne 1974).

However, the results gathered in the pilot study provided little clarity as to the combination of structure, culture and leadership that would be most successful in bringing about a real shift in the way institutions offer their teaching. Very tentative indications were that newer institutions were finding it easier to shift the culture than older ones, and that strong, top-down leadership helps to drive the change. However, there are few cases where the leadership appears to be doing this in an inspirational rather than coercive way, and this may pose problems in the longer term. What did emerge from this small study is that even those who *are* making progress toward distance or blended education delivery, do not feel that they have yet 'got it right'.

Background of the researcher

Sally Anderson has worked within the field of distance learning and more recently blended learning for the last 20 years. Initially, this experience was in a private distance education college with a very focused planning cycle and an hierarchical (although fairly flat) management structure. Thereafter, she worked on the staff of two of the institutions in the study, heading up blended learning divisions and working at various management levels in these institutions to develop strategies and plans for blended learning at an institutional level. Moving blended learning along, despite professed institutional goals in this direction in both institutions, proved to be extremely difficult. This, and the great contrast in the management styles and culture between the private sector and the university sector, led to an interest in how these areas work together and facilitate or hinder the introduction of a change which has institution-wide implications.

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Since leaving full-time employment, Sally has done consultancy work for all the institutions mentioned here. While the interviews themselves were being done, she was not actually employed by any of the institutions nor was she doing work for them at the time. While this background gave her valuable insights and access to the institutions, it also has the potential to cause problems. The issues around this are discussed in more detail in chapter 4.

Overview of the thesis

This thesis reports on further research which built on the pilot study described previously.

The inconclusive results of that pilot study and the decision (for pragmatic and logistical reasons) to shift the research to a multiple case study rather than a broad comparative study meant that the research question needed to be reformulated. The question was finally formulated as:

'How do the vision, culture, management style and strategic planning process work together when a potentially significant change such as the adoption of blended learning is on the institutional agenda?'

The study looks at the strategic planning process in each institution and finally homes in on whether there were strategic goals incorporating blended learning and how those were being realised. The aim of the study was to develop potential solutions which will help institutions reduce the mismatch between the planned and the actual. Essentially, the study uses blended learning as a prism through which to look at institutions and cast light on how vision and strategy are formulated and implemented.

As this research took place over a number of years, blended learning took on far greater significance for institutions than distance learning. These terms are

discussed in more detail in chapter 2. Blended learning can be used to include distance, flexible and various forms of technology-supported learning, including the use of virtual learning environments (VLEs) to support on-campus students. As the editor of *Distance Education* (October 2002, p. 135) states, 'while open and distance education systems based on print continue to serve critical learning needs, there is no doubt that a great deal of current focus of scholarly work in the field of open, flexible, distance education and training is in online learning environments'. For the purposes of this research, the term blended learning was used to refer to offering a learning experience with elements of self-study and electronic delivery and support to students who typically visit campus regularly, while distance learning was used to describe the offering of learning experiences to students who were mostly or always off-site.

The thesis begins by providing some background on the public face of distance learning and blended learning as it relates to universities. It looks at figures on how many institutions state that they are interested in these initiatives and explores general views on how successfully they are being incorporated into the university environment. Some of the environmental and political drivers which are moving institutions in this direction are discussed. An argument is made for the strategic nature of a shift from conventional to distance or blended learning delivery modes. The importance of institutional structure, management style and culture in making this change are highlighted. Definitions of distance and blended learning are discussed, along with the forms that they might take for both on-site and off-site students. This discussion highlights the fact that there are many differing opinions and circumstances in which the terms blended learning and distance learning might be used. However, as the discussion in chapter 2 shows, the dividing line between these two categories (and indeed that between full-time, part-time and distance-learning students) is becoming less and less easy to draw.

In chapter 3, the literature survey is presented. Because of the complex nature of the enquiry, the literature survey deals with a number of different areas.

- First there is an overview of writing on management models and cultures in universities. This covers the main literature used for the pilot study (Mintzberg and Quinn 1988, Weber 1947, Noble and Pym 1970, Cohen and March 1974, Deem 2000).
- The next part of the literature survey uses literature from the distance learning canon to focus on some of the issues that might come into focus as institutions move away from traditional teaching modes towards a more blended approach. This section discusses work from, among others, Rumble 1981, Carl 1985 and 1992, Idrus 1997, and Peters 2001. Combining the literature from distance learning with that emerging from more traditional institutions is not often done, and thus might be considered one of the original contributions of this thesis. Indeed, as noted recently by Calvert (2005, p. 227), ‘new researchers in [online learning] do not ground their work in the accumulated body of distance education theory and research’.
- After this, the chapter considers in some detail the theory of strategy formulation and relates the various schools of thought (for instance Mintzberg *et al.* 1998, Weick 1990, Quinn 1980, Burgelman 1983, and Lenz and Lyles 1985) to strategic planning in higher education.
- Finally, the emerging literature on strategic planning within further education (FE) and higher education (HE) is discussed, including writing by Shattock 2000, Pidcock 2001, Allen 2003 and Westera 2004.

In chapter 4, some literature on research methodology is explored. The planned methodology of grounded theory is discussed in some detail. The chapter looks at some of the practical issues relating to grounded theory and explains why this method could not ultimately be followed in its pure form. The chapter then moves on to look at case studies, in particular the value of multiple case studies. Research methods are discussed and an argument is made for semi-structured

interviews, particularly in the light of the researcher being so familiar with the institutions studied – in some cases to the point perhaps of being an ‘insider’.

The next chapter explains in some detail the actual process followed when setting up the study. The reasoning behind the way in which sites were chosen is explained, and the way in which personnel were chosen for interview is discussed. This chapter also presents the brief descriptors of culture, management style and organisational structure which were used as prompts for all staff participating in interviews and points to their roots in the literature covered in chapter 3.

Chapters 1 through 5, therefore, lay the foundations for the study through the literature explain the chosen methodology and detail actual methods used for the study. In chapter 6, the results are reported and analysed in the form of case studies. Each case is divided into a discussion on:

- structure, management style and culture;
- vision, goals and planning;
- the blended learning agenda and strategies to encourage it; and
- drivers and tensions.

Each of these sections is denoted by a subheading in a lighter fount.

Where points are illustrated by direct quotations from participants in the study, these are presented in a slightly smaller fount and centred on the page for clarity.

All the institutions studied have some brief for blended learning, but the results of interviews as presented in this chapter show that each institution is modifying this to suit its own particular culture, and each has its own particular profile of successes and discomforts. There does not appear to be any one ‘exemplar’ which is being followed for the introduction of blended learning, and the picture that emerges is that the introduction of an innovation as potentially far-reaching

as blended learning must deal with a far more complex situation peculiar to each institution than merely 'changing the culture'.

Despite the unique combination of culture, blended learning strategy, institutional structure and management style for each institution, a number of common trends emerge and these are covered in chapter 7. Some of the emerging trends, such as institutional fragmentation and the difficulties this causes with planning, the separation of line management function and organisation structure and emerging new structures, follow from and confirm much of the literature discussed in chapter 3. However, some new factors emerge, such as the importance of budget/resource allocation models in introducing new learning approaches, and the tension between the research and learning and teaching agendas within institutions. The data shows that, in the sample, the strategy of championing is almost universally adopted for the introduction of blended learning. However, as noted in the literature discussion on commercial strategy formulation, there are difficulties with this approach and these are explored in this chapter.

The last chapter takes the factors identified in the fieldwork and relates them to the literature already covered. From these two angles, a model is built on which the profile of institutions can be plotted. Through looking at the way in which certain factors (such as the strategic planning process, the culture of the institution, staff's impression of the budget process, the role of the principal in strategic activity) combine for each institution, the model can help to predict areas in institutions where there is likely to be discomfort as an innovation is introduced, and areas where there will be relative success. This model reveals the complexity of the change process for institutions, and the number of factors which need to move in concert to create a climate which is not only likely to lead to success, but also will cause as little disruption as possible. Where time is a crucial factor, and a slower, more incremental process is not appropriate, it

will at least allow managers to recognise the areas which are likely to cause problems and put strategies in place to deal with them.

Each institution is plotted on the model and the results are interpreted and discussed. This is related back to evidence from interviews to illustrate the points and also to provide some triangulation for the model.

Finally, the main findings are summarised and ideas are provided on the implications of the model and directions where further research may prove fruitful.

Chapter 2: Background to the study

Traditional higher education institutions in the UK and, indeed, across the world are under many pressures to offer learning opportunities differently from the way they have traditionally done. Some of this pressure is economic, some of it is technological. Much of it is fuelled by customer demand. We are living in the age of the knowledge worker and the lifelong learner (Rowley *et al.* 1998). These are students who wish to study flexibly, in surroundings and at times that suit them. In many cases, the institutional answer to these pressures has been to introduce e-learning in the form of a virtual learning environment (VLE). On-site students are able to access lecture notes and handouts away from the classroom, they are in contact with other students without necessarily having to be in the same place at the same time, and are also encouraged to take more responsibility for their own learning. E-learning has also been seen as a way in which lecturers can more easily service the need of ever-increasing student numbers, as well as coping with administrative demands and keeping up their research.

Economic pressures have also brought distance learning to the minds of many institutions who until now have used more traditional classroom-based methods to deliver their programmes (Farrell 2001). Indeed, as early as 1997 Daniel stated that in the UK about 75% of universities were offering some form of distance or technology-assisted learning.

In many ways, the old barriers to distance learning which were prevalent a generation ago have been broken down by the success of the Open University. Distance learning does not have the stigma of second-chance, second-rate education that it once had. Indeed, if, as Daniel states, 75% of universities in the UK are engaged in distance learning or technology-assisted learning, surely this is now merely another mode in an increasingly diverse environment? This view is certainly one that is confirmed by Latchem and Hanna (2002, p. 205) who state that 'what began at the "low end" of the marketplace as correspondence

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education is becoming a dominant force'. This is partly because the advent of e-learning and VLEs has brought the dimension of communication and group activity to distance learning, giving it a more acceptable face in more traditional environments. Most recently, Muirhead (2005) states that: '...distance education has moved from the edges of the academy and now has a more strategic focus within university administration.'

In those cases where distance-learning is seen as an institutional objective, higher education institutions (HEIs) see it as a way to increase their student numbers considerably, to extend their educational offering to a world-wide audience and to increase their income while reducing their reliance on government funding (Farrell 2001). Institutional strategic plans which encompass distance learning do not describe small, peripheral distance learning ventures. They are looking at distance learning for its potential as a broad-spectrum, cost-efficient, mass delivery method. However, this mass delivery does not appear to be what is actually happening on the ground where many institutions are developing 'boutique distance education programmes with small numbers' (Daniel 1997). In the blended learning environment, where institutions are looking at using VLEs to support students, evidence emerging from recent conferences is that this conversion is also happening more slowly than planned.

The pressure on institutions to go down the blended route or offer e-learning programmes is constantly increasing: see for instance, the availability of Universitas 21 courses (an example is available at: <http://demo.u21global.com>) and also the MIT Open Courseware initiative, an example of which can be found at: <http://ocw.mit.edu/index.html>. Commercial activities are also impinging. For instance, IBM's Mindspan Solutions workplace and training systems employs 3,000 people to develop customised e-learning content for 900 clients in 57 countries (Taylor, 2003). While the validity of this comparison might be debated, given the perceived difference between training and education, what this does show, is that more and more people are engaging with

learning this way, and institutions will be pressurised by their student markets to keep up.

What is distance/blended learning?

As noted in the introduction to this thesis, over the years that this research took place, the emphasis in many institutions has shifted from distance learning to blended learning. In order to contextualise this research, therefore, the nature of distance and blended learning needs to be considered.

Taylor (1998) suggested a number of generations of distance learning, and further refined them in 2003. These are:

- The correspondence model
- The multimedia model
- The telelearning model
- The flexible learning model
- The intelligent flexible learning model.

(Taylor, 2003, Powerpoint presentation, p. 55)

These generations are not mutually exclusive, but rather rely on what is appropriate for a particular market. So, for instance, an institution offering education to very remote learners without the benefit of up-to-date communications technology might still use a basic correspondence model (print materials and postal communication with a tutor) or a multimedia model where students supplement their printed materials with radio, video or CD ROM materials but still communicate with a tutor primarily by post or telephone. A flexible learning model begins to combine the best of the features of face-to-face learning (teacher available at certain points to discuss particular issues; instant feedback on understanding of content, etc.) with the benefits of flexibility (no need to be in the classroom for as long; availability of materials through different sources; ability to create simulations and virtual field visits

not possible in traditional environment). In addition, the intelligent flexible model uses the benefits of a VLE to put students in touch with each other as well as their tutor through the use of email and software which enables group work.

From the discussion above, it is easy to see how the flexible approach might be called a blended one, particularly for on-site students who would be combining technology-assisted learning with the lecture environment. The spectrum of activities here is getting wider and wider. Some of the possible combinations can be illustrated diagrammatically as follows:



Fig. 1. The dumbbell model

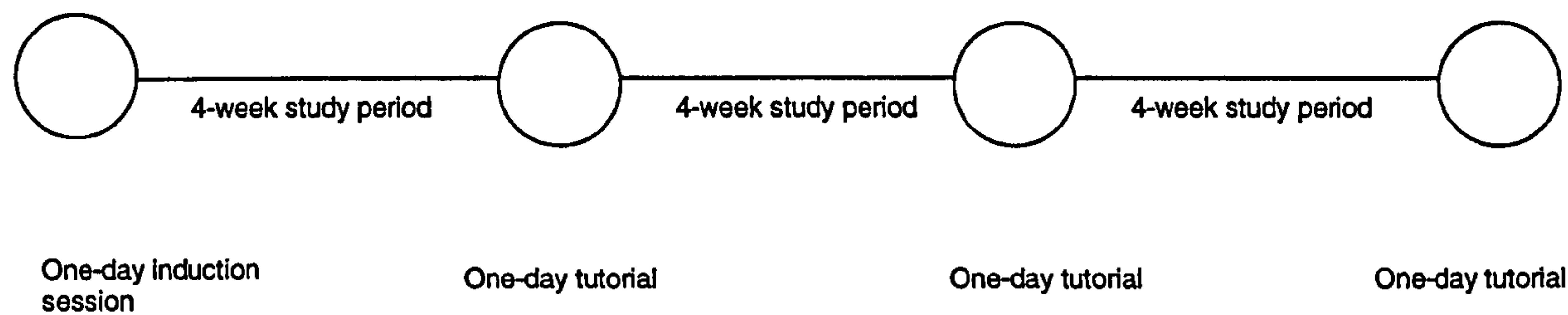


Fig. 2. A block release model

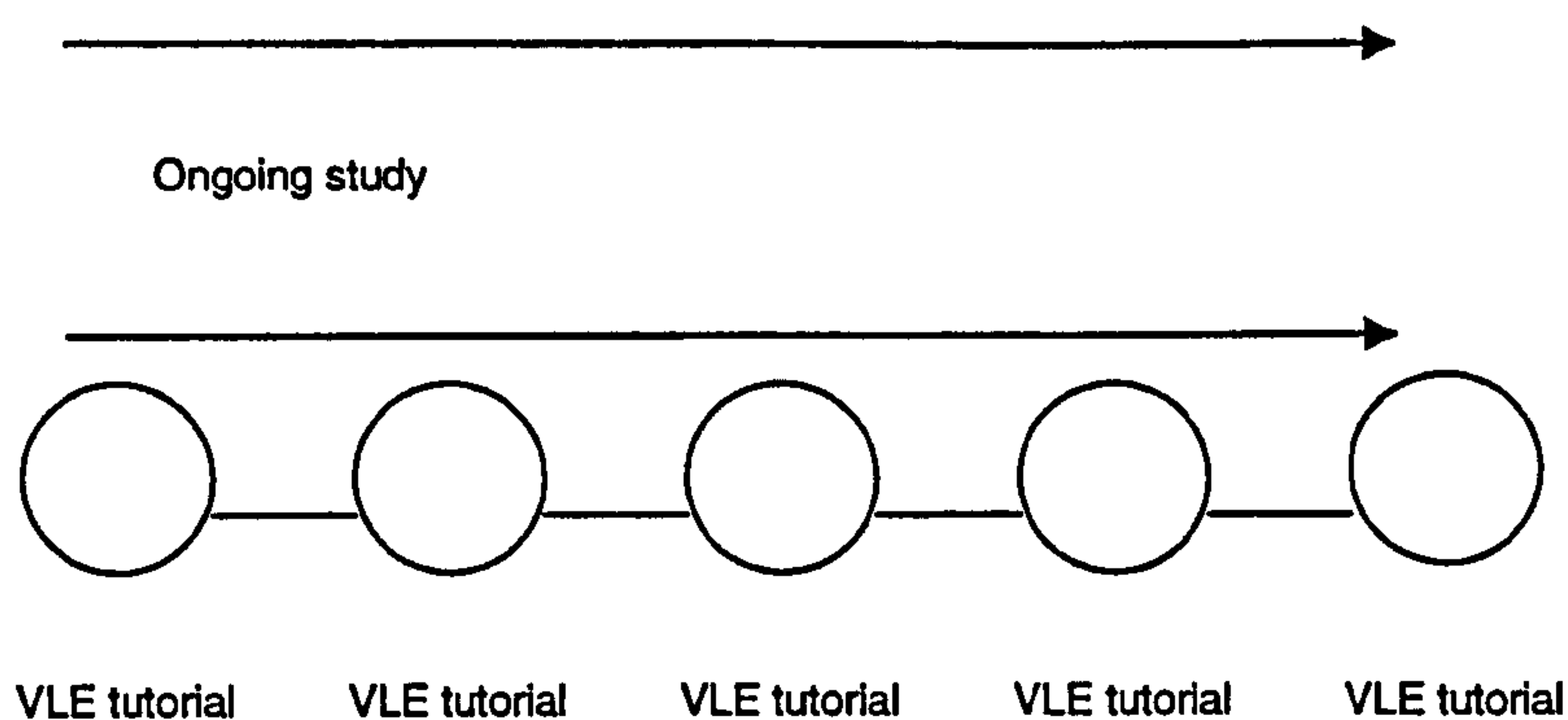


Fig. 3. VLE-supported mode

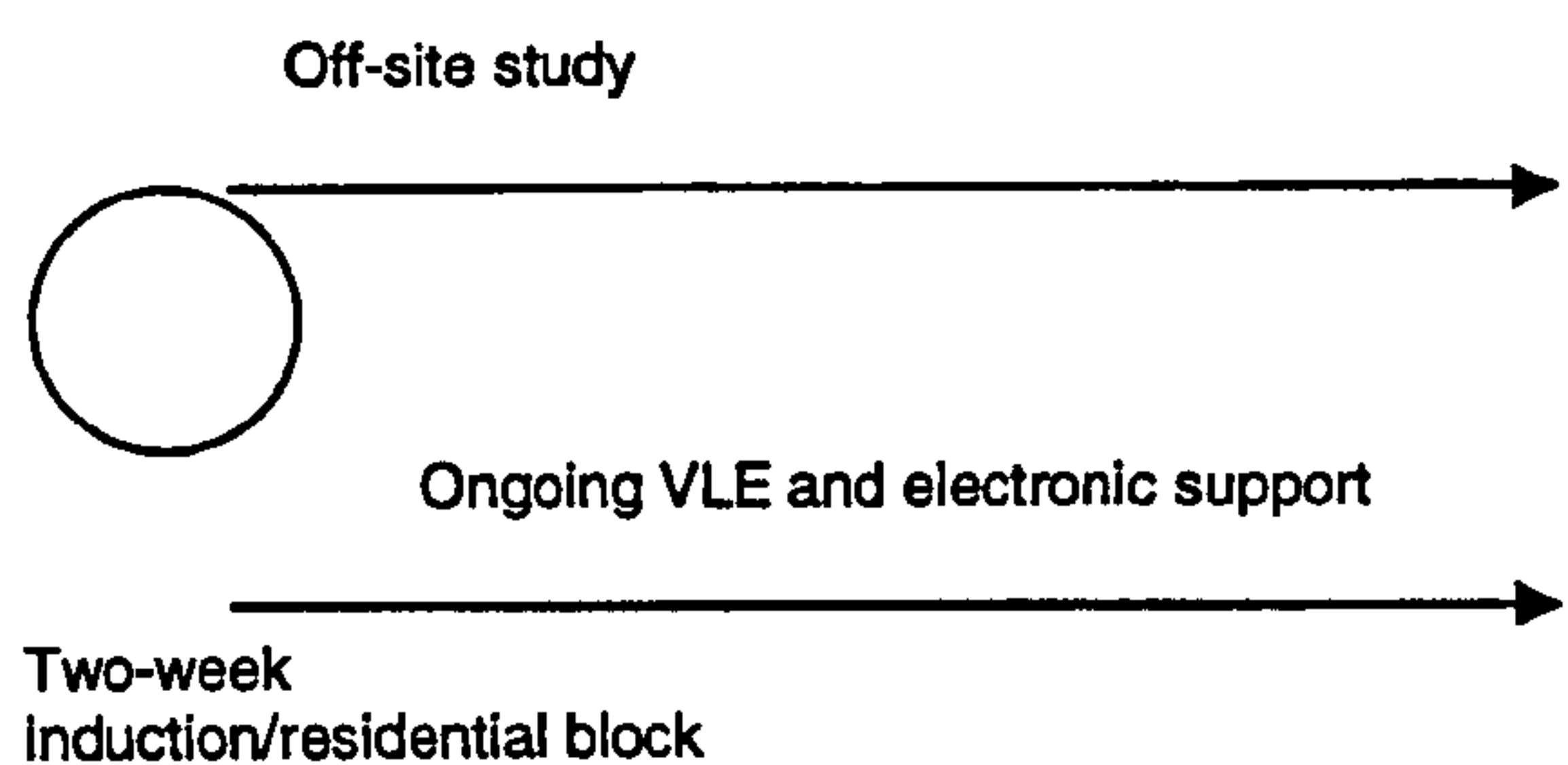


Fig. 4 Inducted VLE model

(Anderson, Morss *et al.*, 2002, p. 23.)

Muirhead (2005) encapsulates all these faces of blended learning when he describes ‘a new context of technology-enhanced, hybrid, distributed, just-in-time, Web-centric flexible learning where learner and learning resources/supports do not share a contiguous physical space’.

Clearly, some of these combinations of experiences are closer to traditional institutional practice, and some of them are closer to distance learning practice.

This thesis began with the idea of finding out how university structures and

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management practices were positioned to accommodate a move away from the traditional mode towards some form of distance or blended learning, whether that took the form of a small or large shift.

Chapter 3: Literature survey

Literature on higher education (HE) reveals a reluctance to draw from related cultures. As examples, main educational management models are careful to distance themselves from corporate models; there is very little literature on strategic planning in HE, and no evidence that any lessons have been drawn from the considerable body of work emanating from the further education (FE) sector; much of the change management literature is drawn from school experience, with little cross-over, and in the area of flexible, distance and blended learning it is rare (indeed many searches revealed only one article (Jung 2001)) that the literature from established distance education practice is drawn on.

This investigation needs to address multiple areas:

- university management theory as it relates to culture
- change management for education
- barriers to the development of distance learning
- contrasts and comparisons between distance learning and classroom-based institutions, and strategic planning both in broad theory and within institutions.

In the light of the statement above, in many cases this could be done only by investigating research outside of the direct HE canon.

A brief summary of some of the main management models for education

Collegial model

Weber (1947) identified what he called a bureaucracy as being the most efficient form of management model. This hierarchical structure lent itself to

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successful and systematic management. He posited a special case of this model, called a professional bureaucracy, in which legitimate power is vested in a collectivity of equals, similar to that which is described as a collegium in universities. Becher's (1989) examination of university culture concludes that although hierarchies are present within universities, they are not pure, because of the concept of academic freedom. This creates collegiality in the sense of a community of scholars who work together and respect each other's intellectual independence regardless of age and position. This has led to the understanding that authority is always ratified from below. More recently, Bush (1995, p. 52) has described collegiality as a model which 'assumes that organisations determine policy and make decisions through a process of discussion leading to consensus. Power is shared among some or all members of the institution who are thought to have a mutual understanding about the objectives of the institution'.

Noble and Pym (1970) point out that a major problem with this model is the receding locus of power - in other words, in this kind of organisation, the actual decisions are always being made elsewhere from where the discussion is happening (lower committees say 'oh we're advising the senior committee', senior committees say 'we're merely ratifying the decision of the lower committee'). Even if a decision is made in any one area, the responsibility and therefore accountability for that decision is not necessarily felt to be owned by the decision-makers. Other issues, such as the slowness of decision-making and the lack of recognition of non-academic staff, as well as the independence of the teacher and the strength of departments within the collegial model have been recognised (Brundrett 1998, Hellawell 1991, Hellawell and Hancock 2001), and all pose particular problems for the introduction of a change such as the use of distance or blended learning.

Schools advocate collegiality as a vehicle for change, while in the university environment it is currently being seen as a stumbling block to change. Brundrett

(1998), for instance, asserts that collegiality is a vehicle for change and improvement. What is the root of the difference here? Is it to be found in the notion that universities are not truly collegial in their approach? Perhaps, as noted earlier, there is a dysfunctional form of collegiality in HEIs – organised anarchy.

Morrison (1998) notes that the list of characteristics of failing companies in actual fact characterise the bureaucratic model:

- inflexible procedures or rules
- managers not committed to or experts in managing change
- problems within and between groups
- inadequate and ineffective communication
- insufficient strategic thinking
- senior managers were only concerned with the short term
- low level of trust.

These frighteningly accurately describe many of the issues in universities – perhaps bringing them closer to bureaucracy than collegiality.

Greenfield's (1973) 'subjective' model

This model focuses on the people who work together to make up the institution and denies the idea that the institution itself can be seen to have goals and an existence apart from or in contrast with the goals and ideals of the people within it. Morrison (1998, p. 152) confirms the importance Greenfield attaches to the individual in resisting or progressing institutional change by stating that 'change can be brought about by changing recruitment and selection, redeployment and redundancies, reorganising...so that staff who display the "right" qualities occupy influential positions'. Successful change in this context, therefore, means aligning institutional goals and those of personnel. This was affirmed in an inverse kind of way by an early interview conducted for this study, in which it was stated that in order to get staff to participate in the change, strategic plans

have been couched in terms which allow staff to align themselves with the goals.

Organised anarchy

Cohen and March (1974) developed a management model for universities based on their studies of American universities and colleges which they describe as being characterised by the inability to identify goals. Therefore, decision-making happens in ways that are different from the rational approach that might be taken in a goal-directed environment. This creates what they called 'organised anarchy'.

Whatever the comparative situation was between the US to the UK at the time of the development of the model, it is no longer true to say that UK HE institutions do not have goals. Institutions in the UK are now required by their funding councils to work with a planning process and produce five-year plans (and many, in recognition of the fast pace of change, produce annual ones as well). Therefore, all HEIs do ostensibly have goals against which decisions can be made. This brings into question the validity of the organised anarchy approach for universities in their current environment.

Nevertheless, despite having clear institutional goals, it seems reasonably clear that decisions are not consistently made to further them. Why might this be so? One possible explanation is that the implementation phase of the planning cycle is not well enough developed to carry the action through. In addition, as Cohen and Marsh discuss, decisions are not dealt with in this model in an organised way. Issues are allowed to stay in the system until they attach themselves to a solution or until other developments change the way they are viewed. Another problem with the organised anarchy model is the way in which it focuses so strongly on the organisation as an entity - and at that, one which does not know what it is doing. This is difficult to support in the light of the fact that some

individuals within organisations clearly believe that they know what they are doing and how the institution is progressing. In the final analysis, it is hard to see organised anarchy as a culture in and of itself. It may be easier to conceptualise this model as a dysfunctional version of other institutional models.

Collegiality as the prevailing model

Without a doubt, it is the collegial model which has the most currency within academic institutions. This is indicated by the fact that it is still researched (although largely in the school environment) but also by the fact that current trends in educational management are still measured against it as a yardstick (Deem 2001, Robertson 2002, for example). Collegiality, as has already been pointed out, has a number of problems associated with it. However, possibly its largest failing in the current university environment is that it deals only with the way in which the academic community interact, and does not focus on the other postholders and roles within the university as a whole. Little has been made of this divide in the literature on educational management, although it is pointed out by Hellowell and Hancock (2001) in their article on the changing role of the middle manager in academia. This divide may have been acceptable when all the non-academic staff within a university worked in records, laboratories, canteens or other non-academic areas. This is no longer true. Academic-related activities and staff members have become more and more necessary to the functioning of the institution. This begins to draw the traditional university closer to the distance learning systems model proposed by Erdos (1975) (see Appendix 1), in which the systems of the institution are far more closely intertwined than before. It also reflects the model proposed by Weick (1980) who describes universities as loosely coupled systems. One of the important results of this, is that the institution must rely more and more on central groupings which gather information on the situation beyond the institutional boundary and process it for dissemination to other internal units.

Blended learning challenges this traditional divide between academics as the provider of the learning experience, supported by other services, in an even more focused way. IT and library staff, administration and quality personnel have long been parts of the team that is required for the institution to function smoothly and achieve its core goal of providing students with a meaningful educational experience, and while their support role is undoubted, it does not necessarily impinge directly on the success of the learning experience that the lecturer presents to students in the classroom. In order to achieve similar success in a blended learning environment, the lecturer works in tandem with new team members such as educational development specialists, instructional designers and educational technology advisors. These staff do not simply provide technical know-how and support. They are experts at the educational level on how technologies can best be used to present subject-matter effectively for successful learning.

Against this background, a collegial approach which allows academic staff to see themselves as separate from and perhaps in some way superior to these functions is one of the major factors in dividing institutions, reducing their effectiveness and facilitating failure of change. Indeed, on further consideration of Bush's (1995, p. 152) definition of collegiality, which states that 'power is shared among some or all members of the institution who are thought to have a mutual understanding about the objectives of the institution', the exclusion of academic-related staff can be seen as actively disempowering.

New managerialism

Trowler (1998) discerns two kinds of emerging management in the university environment: soft managerialism and hard managerialism. The first he describes as being backed up by student-centred rhetoric. This kind of management can lead to problems with administration and issues with 'the centre' of the institution. If this model is to be successful, it relies heavily on resourcing the

centre to cope. The second is focused primarily on efficiency and economy and may result in the devaluing and mechanisation of the academic role.

‘Hard management’ is further built on by Sawbridge (quoted in Land 2001), Deem 2001, Robertson 2002 and others, who describe it as ‘new managerialism’. New managerialism derives from the incorporation into university management of practices commonplace in the private sector, particularly the imposition of a powerful management body that overrides professional skills and knowledge. It is driven by efficiency, external accountability and monitoring, with an emphasis on standards (Utley 2001). This is seen by some writers to be a regressive step, eroding the collegial structures within universities (but note the discussion in the previous section about whether they really exist at all). Trowler (1998) also makes the argument that staff find different ways to be empowered and their positions are not as devalued as other writers depict. Robertson (2002) notes that ‘managerialism fills the void left by incoherent models of what is to be managed. Until management models get a satisfactory conceptual grip of the entity to be managed - bureaucracy, business, collegium or organised anarchy - we will struggle...’. This reflects the kind of dilemmas and uncertainty which the models try and encapsulate.

Conclusion to the education management model discussion

From the discussion above, a continuum of cultures can be discerned:

- *beginning with* the subjective approach where individuals may align themselves with the goals and aims of the institutions
- *through* a political approach
- *then* a collegial approach which is aimed more at consensus and teamwork and
- *then* a managed approach which starts to use some of the terminology of the commercial world

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- to an enterprise model which is market-focused and more commercially orientated in terms of its strategic goals and processes.

The contrasting models of management in distance learning and higher education

Little has been written so far concerning management of conventional higher education institutions and how this sits with the blended learning agenda. However, the distance learning literature can provide some idea of the kinds of models which will have an influence.

The literature on managing distance learning is unambiguous in its assertion that in order for this mode to be delivered efficiently, a tight, hierarchical structure of management is necessary (Rumble 1981, Kirkpatrick and Jakupiec 1997, Carl *et al.* 1992, Peters 2001, Farrell 2001). Much of the discussion around managing distance learning centres around the concept of 'unbundling' the design and delivery of the learning opportunity (for example, Idrus 1997, and Austin and Kortens 1990) - a sort of mass education assembly line with complex interlinking between academic and support components. For one of the earlier conceptualisations of this, see Erdos (1975), which is encapsulated in a useful diagram reproduced at Appendix 1. This view is supported in far more recent e-learning literature (Patel 2001). If this complex interlinking is not carefully done, 'disagreement, skirmishes and wars can ensue...' (Carl *et al.* 1992).

Because most of the distance learning institutions covered in the literature function within a competitive environment (as indeed do most more traditional higher education institutions in the UK in the current educational climate) (Rowley *et al.* 1998), considerable emphasis is placed on the need for quick,

efficient decision-making and adjustment to change (Idrus 1997, Farrell 2001). For some time, authors have noted that in the existing educational climate, strong leadership and a culture of innovation and risk-taking will need to be encouraged in educational institutions to help them keep pace with the changing needs and demands of its customers (Rumble 1981, Carl 1985).

The literature on management within traditional higher education institutions is far less clear. Indeed, whether institutions are actually managed, or merely administered is an issue which came into clear focus in the course of this research. Most institutions function with what seems on the surface to be a basic hierarchical structure. However, as will be explored in chapter 7, unlike commercial organisations where this structure would also be expected to reflect the management lines, universities do not necessarily include the idea of line management functions when they describe their organisational structure.

We must look more towards cultural descriptors to glean information on how things are managed. There is the culture of collegiality which has been explored already - what Mintzberg and Quinn (1988) call a professional bureaucracy - among the academic personnel. Departments and subgroups can function largely independently, as 'cells' (Rumble 1981). Therefore, alongside the hierarchy is a complex committee structure which allows participation of this collegium in the decision-making of the institution - as Deem *et al.* (2000) describe it, a compromise between managerial control and professional autonomy. Despite its prevalence, this collegial model is an aspirational one; it might even be described as 'virtual', in that while it is a prevalent belief about the culture of institutions, actual practice can be interpreted differently as was discussed above in the brief description of some alternative models.

One characteristic, however, that is common to all the models which have been described previously is the fact that decision-making is often slow and in many cases does not allow for active management of the institution towards strategic

goals (Noble and Pym 1970, Rumble 1981). Indeed, as Mintzberg and Quinn (1988) point out, in a professional bureaucracy, innovation can be resisted, even when environmental pressures make radical change imperative. The view that this is the case in the institutions shifting towards new modes of delivery is supported by Carl (1985), Farrell (2001) and others. Dissenting voices on this aspect of collegiality have already been noted, emanating from management research in schools (Brundrett, 1998; Hellowell, 1991, for instance). In addition, Hannan (2000, p. 7) makes the point that 'there is the possibility that change needs to be resisted, that we should applaud those aspect of institutional or academic cultures that construct barriers to change'. He qualifies this by saying that this should apply only to undesirable change although admits that this is difficult to identify in the first flush of a new idea or technology. However, the conclusion that he comes to is a valuable one for this research - and that is that we should not be addressing change as a general concept, but specific changes, such as in this case the introduction of blended learning.

In the current climate of severely restricted resources, the problems raised by a collegial culture are further exacerbated because a dichotomy exists between the need for management to cope with using limited resources effectively and efficiently, and the idea of collegiality (Davies and Casey 2001). When resources are tight, the solution is often to become more controlling from the centre.

Strategy formulation

Blended learning in traditional higher education institutions has the potential to change radically the way that institutions operate, and can affect (and be affected by) almost every area of the institution. While this kind of radical change is only a potential development, rather than necessarily an intended or even desired outcome (Boys, 2002), the fact that institutions are including

blended learning in their strategic goals means that it is important to understand how the strategy formulation process happens and where it fits into a theoretical framework.

This section will summarise some of the main concepts around strategy and will also discuss initial ideas about how these fit with university strategy formulation and planning as background for the analysis of the interviews conducted.

Overview of strategy formulation positions and schools of thought

Mintzberg *et al.* (1998) provide a useful and insightful overview of the theory in this area. Each of the main 10 schools of thought they identify will be described, summarising their main characteristics and drawbacks, and then where appropriate, tied in to university strategies through the literature already covered.

The groupings which Mintzberg *et al.* use can be tabulated as follows:

Name of school	Approach	Some contributors
Design	Process of conception	Selznick, P (1957); Chandler, A (1962); General management group, Harvard Business School (1965)
Planning	Formal process	Ansoff, H. I (1965); Steiner, G. (1969); Porter, M. (1980)
Positioning	Analytical process	Porter, M. (1980); Henderson, B. (1979); Military strategists
Entrepreneurial	Visionary process	Schumpeter, J. (1950); Collins and Moore, 1970); Studies at McGill University; Mintzberg, H. (1973)

Cognitive	Mental process	Huff (1990); Duhaime and Schwenk (1985); Weick, K (1990); Bateson (1972)
Learning	Emergent process	Lindblom, C. (1959); Quinn, J. B. (1980)Burgelman, R. (1983); Senge, P. (1990)
Power	Process of negotiation	Bolman and Deal (1997); Allison, G. (1971); Pfeffer and Salancik (1978)
Cultural	Collective process	Spender (1989); Pettigre, A. (1985); Rieger, (1987); Schwartz and Davis (1981); Scandinavian Institutes for Administrative Research; Barney, J. (1991)
Environmental	Reactive process	Hannan and Freeman (1984); Meyer and Rowan, (1977); Oliver (1991)
Configuration	Process of transformation	Chandler, A (1962); Khandwalla (1970); Mintzberg, A. (1979, 1983);Miller, D. (1976, 1996); Pettigrew, A. (1985)

The design school

The main concept of the design school is that a once an initial external and internal strengths, weaknesses, opportunities and threats (SWOT) analysis is done, various strategies can be suggested and a ‘best fit’ one found (Andrews, 1987; Mintzberg *et al.* 1998). The chief executive officer (CEO) is the chief strategist, determining the direction of the enterprise, as well as providing the drive to take it there (Day, 1994). This school of thought does not distinguish between goals/values and strategies, but rather it admits that goals/values are difficult to determine. Indeed, Andrews (1987) considers them to be so

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interdependent as to be inseparable. While the design school was the beginning of theory and research into the area of strategy, and forms the bedrock on which many other schools of thought are premised, it has a number of drawbacks, both generally, and from the point of view of higher education.

In general terms, this theory has been criticised because it tends to separate thought (the creation of possible strategies) and action (the process of choosing a best-fit strategy and implementing it) (Mintzberg and Waters 1985, Andrews, 1987). This results in a very linear process which does not take account of potential incremental steps towards formulating strategy. The theory and process also assume that it is possible to know with some certainty the internal and external environment. This becomes problematic in times of uncertainty. Indeed, in times of uncertainty, articulating a strategy and sticking to it could form a kind of straitjacket for the organisation which will prevent it from moving to deal with a dynamic situation (Quinn, 1980; Mintzberg and Waters, 1985).

Planning school

This school built on the basic premises of the design school, but the main difference is that it saw the process of strategy building as providing a vehicle for control of the organisation.

The planning school took a very quantitative focus to finding the best-fit strategy. It distinguished between goals and the strategies used to achieve them, but posited that if goals could be quantified, the measurement of their achievement would give management the tools to control the organisation's progress. Therefore, the process in simplified form might be:

1. set goals
2. quantify targets for achieving these goals
3. develop a broad plan

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4. develop implementation through a number of sub-plans
5. formulate budgets to fund these programmes
6. bring all the sub-plans together into a large 'blueprint'.

(Chakravarthy and Lorange, 1991; Mintzberg *et al.* 1998).

The planning process is described in this way in the further education arena (Watson and Crossley, 2001) and the higher education arena (Allen, 2003), and indeed by many of the participants in this study. However, the feature of control is largely missing, in that the culture described in most institutions does not allow for the authoritative implementation of the targets and plans articulated at sub-plan/programme level.

There are other problems with this school of thought. For instance, the concept of control does not take into account the possibility of emergent strategies, which may be very effective (Mintzberg and Waters, 1985). The very process oriented focus of the planning school has the potential to become overrationalised and stagnant, leading to strategies that do not drive action and many other dysfunctional effects (Lenz and Lyles, 1985; Johnson, 1988). One of the problems noted in the institutions sampled for this study has been that the strategies land up being documents which fulfil Scottish Higher Education Funding Council (SHEFC now Scottish Funding Council, SFC) requirements (Shattock, 2000) and then sit on the library shelf. They are not embraced as part of the daily activities of staff. This may be because, as Watson and Crossley (2001, p. 114) note:

'Many of the basic assumptions underpinning the Further Education Funding Council's directives on strategy are rooted in a rational-scientific model that proposes the creation of a [strategic management process (SMP)] that is sequential, linear and controllable. Yet work by Mintzberg (1994) and others strongly challenges this stance, for the SMP must be seen as an arena of complexity and subtlety that necessitates a cognitive and a social process.'

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Allen (2003) also criticises the way in which higher education was encouraged to adopt strategic planning approaches focusing on ‘the unquestioning belief in the rightness of a particular brand of corporate management’ (p. 61).

Another interesting parallel with HEIs is the introduction within this model of a new position – that of the ‘planner’. It is interesting to note that Mintzberg *et al.* (1998) state that by 1984, much of this model had fallen out of favour, and the ‘days of the planner were over’ – and yet the department of planning and the role of planner are relatively new concepts within universities. In one institution where interviews took place, the planner had held the (new) post for only two years. Is HE really that behind the times in this area, or is there a renewal and re-recognition of the value of this kind of post? It may be that as Mintzberg *et al.* point out, there is a role for planners in providing information, acting as catalysts for the creation of new perspectives and scrutinising strategies to assess viability. Lenz and Lyles (1985) tend towards Mintzberg *et al.*’s viewpoint, but rather than seeing the role of planner fading, they focus on the way that it is professionalised and strengthened in a dysfunctional, overrationalised planning system. Shattock (2000) takes a more positive view, seeing a shift in the role of planners in institutions from what he calls ‘a number cruncher...who did not plan in any real sense’ to a more responsive and strategically minded role.

As with the design school, this school of thought is premised on the CEO being paramount in creating strategy, and deals more with the process of choosing and implementing strategy, rather than creating it in the first place. However, as noted in an American study of leadership in liberal arts colleges (Neumann and Neumann, 1999), successful colleges need leaders with high visioning skills as well as high focusing and implementing skills.

The positioning school

This school is more concerned with the content of the strategies than the process of creating/using them. The single most significant difference in this school from the design and planning schools is that it posits only a limited number of strategies as being desirable (rather than an infinite number from which a best fit can be chosen). These strategies become key if they can be defended against existing and future competitors. From this assumption, a set of generic strategies was developed. These could, theoretically, be matched with specific conditions. A thorough analysis of conditions, clients, previous conditions, etc. should lead to a match with a particular generic strategy, hence the description ‘analytical’ associated with this school.

This model emphasises competition and has a very commercial orientation (Porter, 1979). ‘...[T]here is a bias towards traditional big business’ Mintzberg, p. 113. Miller (1986) specifically excludes professional bureaucracies from discussions of the thinking relating to this school. Despite the move to ‘new managerialism’, there is undoubtedly resistance to commercial thinking within HE (Deem, 2000; Allen, 2003) and this may be the reason that this model does not seem to have gained any foothold at all within the HEIs investigated for this study.

The entrepreneurial school

For the first time, this school moves away from a prescriptive, process-driven model, towards a more descriptive one. It aims to describe how strategy formation actually happens in practice. Like all the previous models, it is still premised on the leader being the architect of the strategy, but here the strategy is seen as a result of vision on the part of the leader (Ohmae, 1982). All other areas are subservient to that person’s leadership and vision. This is, therefore,

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not a model which will sit comfortably with a university environment in which there is any kind of collegial approach, although Neumann and Neumann (1999) do highlight some leadership characteristics in successful colleges which are similar to those of the entrepreneur. This approach does move away from the others in that it encompasses the possibility of a combination of deliberate and emergent strategy. Key to the theory is innovation – doing new things or doing things in a different way, or as Ohmae (1982) discusses, asking questions about the organisation in a way which allows an innovative solution.

Mintzberg *et al* (1994) summarise the entrepreneurial approach as follows:

1. active search for new opportunities
2. power centralised in hands of CEO
3. strategy characterised by dramatic leaps forward in the face of uncertainty
4. growth the dominant goal of the entrepreneurial organisation.

Some of the staff in institutions being sampled for this research have classified their organisations as being ‘entrepreneurial’. It would seem likely that they may be so in terms of points 1 and 4. However, given that there is not enough inherent strength in the role of principal (particularly not in a chartered organisation, and even in a statutory organisation where the principal has relatively more power (Reuben, 1996)) they would not be entrepreneurial in the case of points 2 and 3.

The cognitive school

This school deals with how strategy creation actually works in the mind of the strategist. As such, it is the first to deal concretely with how strategy is actually created, rather than what is done with it once it exists.

A fundamental precept of this school is that for strategic cognition to happen, there must exist some kind of mental map to organise and store information in.

A drawback is that when evidence arises which does not fit this map, it may be ignored or rationalised away, rather than redrawing the map to incorporate this new evidence. There is also some evidence that when groups work closely together, they can create a mental map which is actually contradictory to the evidence but fuelled by the myths and rituals of the organisation (Johnson 1988). Despite this, the main focus of this school is what goes on in the heads of individuals, rather than a collective process – although it is at least moving away from a mechanistic, systems-driven approach. This systems-driven approach (SWOT, etc.) is replaced by the beliefs of the managers. This may have some relevance for HE, as it is still unclear from the interview data what processes senior management teams use to develop the strategic directions which they present to their staff for further detailed development and implementation planning.

While this school may turn out to be an indispensable building block for all the others, it has not yet fully realised its potential (Mintzberg et al, 1994). The workings of the human brain are generally still too little understood for this school to offer a real alternative.

The learning school

This school recognises that people, most often collectively, come to learn about their organisation's situation and capability of dealing with it, over time. Eventually they converge on a pattern of behaviour that works. This school began to ask difficult questions which challenged some of the assumptions of the design and planning schools, such as 'who is the real architect of the strategy?' and 'where in the organisation does strategy formulation really take place?'. In fact, the idea that this kind of approach was striking at was the fundamental separation of the thinking process from the doing process which was inherent in previous strategy models. The learning school begins to blend implementation and strategy (Quinn, 1980).

Senge (1990) believed that organisations which are capable of learning from their experience do better than organisations which simply adapt to their environments. On this basis, it would not seem the universities fall within this school as there is little evidence to suggest that they *actively* set out to follow a variety of innovations from which they can deliberately reflect and learn in the strategic arena (although it would certainly not be fair to say this at the individual teaching practice level).

Lindblom (1960, cited in Mintzberg *et al.* 1998) proposed a theory of disjointed incrementalism (which seems to have quite a lot of harmonisation with the ‘garbage can’ theory of institutional management developed by Cohen and March (1974)). This was reinterpreted by Quinn (1980), who put forward the theory of logical incrementalism. So, in an organisation with a great number of systems and routines, even small changes in lots of pockets of activity could result in an organisational shift because of a cascade effect across interlinked systems. If management plays a role in paying attention to activities across the institution, encouraging those developments which contribute to a desired direction and spreading them, providing the environment which will foster desired changes and not others, subtly they can create logical incrementalism. In a similar vein, Burgelman (1983) argues for less focus in the role of management on developing strategy, but more top-down focus on creating a structural context which allows for successful implementation of strategy.

One of the strategies to emerge from this school is ‘championing’, either at senior management level or further down the organisational structure (Quinn, 1980). At these lower levels, though, championing depends on the persuasion of senior managers, and this in turn depends on their judgement and previous experience. This has interesting implications for HE who use a strategy of championing to further their goals as far as blended learning is concerned (Brown, 2002), and is further explored in chapter 7.

Another feature of the learning school which does not seem to gel in the HE context, is the management role in setting up structures to provide subtle backup for the kinds of activities they believe will be beneficial to the organisation (Quinn, 1980; Burgelman, 1983). Indeed, even where blended learning is a very vocally and publicly stated goal (though later discussion will highlight some ownership issues around this), the structures are not modified to encourage a shift towards this kind of activity – particularly reward structures, administrative and IT facilities, etc.

In this school's thinking, the role of management is to set up the structural context which reflects corporate objectives and in this way and through subtle manoeuvring, to encourage concurrent lower level activity. In contrast with the previous heroic view of leaders, it focuses on a more systemic approach (Senge, 1990). But even with this kind of support, there is still the potential for sections of the organisation to break away and move off in a completely different direction. Therefore, built into the model there need to be systems which encourage coherence (Burgelman, 1983). The most crucial one of these is reflection. This means that for the learning organisation, learning from experience should be a deliberate process, rather than just a serendipitous one.

While reflective practice is built into many of the teaching induction packages this researcher has come across in institutions, the same cannot be said of reflection on the direction, choices and practice of the institution as a whole, as they are interpreted at the working level. The role of middle managers here is deemed critical in the learning school, because it is their job to convert tacit knowledge (the kind of instinctive adaptation to practice that lecturers and other staff, for instance, make as new situations arise) into explicit knowledge and use it to inform new products and the use of new technologies (Mintzberg *et al*, 1998). There is an assumption that middle managers are 'ambitious and able' (Lenz and Lyles, 1985, p. 65). But do middle managers in universities even

recognise themselves as such? Are they Heads of Departments? Deans? If they see themselves as working in a collegium, as so many say they do, even if they hold these posts, do they recognise them as management posts with this kind of responsibility? In one institution researched for this thesis, the role of Dean is still a rotating one with obvious implications for the development of the kind of process noted above. While Shattock (2000, p. 97) does not focus on the management role of some members of the academic community, he seems to agree with the importance of the academic as middle manager when he says that for institutional success: 'you need a good management team and a sound financial base, as well as a committed and highly regarded academic community *which shares the management team's competitive streak*' (my emphasis).

The role for senior management in this school, is to provide a broad statement of strategic intent which is intuitively accessible to all staff. In some examples, it is given as a very simple, one-line vision statement.

The power school

The basic viewpoint in this school is that strategy is essentially the product of bargaining and compromise. This school argues, therefore, that it is not possible to formulate, let alone implement optimal strategies. Any intended strategy will be disturbed and distorted every step of the way (Johnson, 1988). When strategy does emerge from within a political environment, it tends to be more emergent than deliberate and more a position than perspective. There may also be many ploys masquerading as strategy, but there is rarely a coherent, integrated vision.

This seems rather more like an 'in spite of politics' scenario for the formulation of strategy, rather than a situation which can be actively drawn on. None the less, Mintzberg *et al.* (1998) feel that politics can have some benefits: they can ensure that the strongest members of the organisation rise into positions of leadership. Politics can also ensure that all sides of an argument are at least

raised for debate, and can be used to stimulate necessary change which is blocked by established systems of influence (in an educational environment, see Baldrige (1971)). This model is seen as significant in complex, highly decentralised organisations such as universities (Mintzberg *et al.* p. 261). However, it seems to revolve more around reactions to stated policies and strategies than their actual development, and so is not as relevant as the other schools to our issue of strategy formulation and planning.

The cultural school

This school sees organisational culture as a kind of collective cognition of the values, standards and codes of conduct of the organisation. Much of this is under the surface and cannot always be articulated by the members of the organisation. This school sees culture as a passionately shared ideology which can essentially form the ‘unique selling point’ for the organisation – and set it aside from others.

This school sees strategy as a process of social interaction based on beliefs shared by members – and herein lies a problem in that while strategies might be emergent in this model, they might also very well be stagnant. Culture does not encourage strategic change but perpetuates existing strategy. This might be fine most of the time, but this model does not help us to understand how to shift things when a radical change is needed. A resource-based view was developed by Wernerfelt in 1984 to try and move this theory along. It posited that if the organisation was understood as a collective social system, its resources, i.e. the capability rooted in the institutional culture, could give it a competitive advantage (see the point about unique selling point above). However, here there is a problem with universities, because their cultures seem to be about a generic view of the purpose of universities, the place and activities required of academics, and the way in which teaching should be done. This does not give any one institution an advantage or particular position with regard to others

(although it may differentiate, say, between profit-making and non-profit-making institutions, or FE and HE).

The source of inimitability comes from the all the parts of the organisation acting together as a social community, and as noted in previous chapters, this does not exist in the university environment, where departmental and subject area bonds are much stronger than corporate ones (see for example, Rumble, 1981). There is also some danger in assuming that strategic advantage equates with organisational uniqueness – being different is good, but not as an end in itself.

This school does not easily translate into strategic management. Once again, like power/politics, culture is more of a factor which needs to be taken into account, rather than the ‘answer’. Strategy formulation becomes the management of collective cognition, an important idea, but one which is incredibly difficult in practice because so many participants have to move together (Mintzberg and Waters, 1985).

The environmental school

Rather than the external environment being one of the three main factors influencing strategic decision-making (leadership, organisation and environment, as is common in many of the other schools), this school places environment at the centre. The organisation is viewed as a fairly passive reactor to what is happening externally. Therefore, the main premises of this school are that: the environment is key in the strategy-making process; if the organisation does not respond to changes, it will fail and possibly die; the purpose of leadership is for reading the environment and ensuring proper adaptation. In the case of educational institutions, this has many resonances with Karl Weick’s (1976) theory of loose coupling. Reactivity to the external environment does

indeed seem to be akin to what universities do rather than taking a more proactive role.

In this model, organisations are seen as having very little, if any strategic choice because they are so constrained by the environment around them. And it is this viewpoint that has led to much criticism of the model, and indeed to questioning whether it is a strategic management model at all.

The configuration school

This school offers the possibility of integrating all of the processes, theories and influence discussed so far. For instance, although Pettigrew and Whipp (1991, p. 6) state: 'Strategy creation tends to emerge from the way a company, at all levels, processes information about its environment', they do not view this as the passive sort of process that is envisaged in the environmental school. Rather, it is a combination of environment, the internal workings of the organisation and the viewpoint of people in the organisation. The main thing about this school is that it links states of the organisation with the strategy-making process. For distinct periods of time, as they go through certain phases of activity, organisations adopt particular forms of structure matched to a particular type of context (Mintzberg, 1979), and this gives rise to a particular set of strategies. The periods of relative stability are interrupted occasionally by a quantum leap to another configuration. Therefore, strategy is about moving the organisation from one state to another, i.e. transformation. The key to this is to manage this disruptive process without destroying the organisation. In this school, strategy management can be conceptual designing, planning, learning, visioning, systematic analysis, etc. but each will be matched with its own particular time and context.

It is perhaps this kind of model which one interviewee had in mind when describing institutional culture thus:

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‘We’re probably all of these at some time or another. It would just be useful to know which was when, so we could react accordingly.’ This echoes Trowler (1998) who says on p. 143 that ‘culture is not always consensual or functional, but often multiple and sometimes conflicting.’

This school identified some stages which organisations move through. They are: development – stability – adaptation – struggle – revolution. These have obvious resonance with the stages that Berge and Muilenberg (2002) propose for the development of distance learning in institutions, which will be discussed later. In the configuration school, of course, the stages are more broadly at institutional level than they are in Berge and Muilenberg’s research. However, as has been pointed out, a true adoption of a blended approach has the potential to cause systemic organisational change as well as more localised change.

Mintzberg *et al.* (1998) state that within the context of this model, the professional organisation (such as a university) seems to prefer a process of constant change at the operational interface, with very little overall or dramatic change. In this context, Johnson’s (1988) discussion of paradigm needs to be considered. Basically, he states that the beliefs and assumptions relatively commonly held in the organisation form a paradigm and a threat to the paradigm can be met by adjusting the paradigm slightly, but from within its own bounds and while maintaining its essential form. It is in this context that we might see universities constantly changing in operational contexts, but not reconsidering at the highest level their fundamental purpose or *modus operandi*.

The answer for universities may be hidden within the quantum theory which forms so much of the basis for this school’s thought. What this theory suggests is that within all the various small strategies proliferating all over the organisation, one or two really novel or useful ones are held (healthy, but in check) in some corner of the organisation until a situation arises where a

transformation is required. It is then possible to find a new, deliberate direction from within the organisation's own emerging activities.

The kind of transformational leap this school proposes may seem to be in conflict with the kind of incremental, learning process of the learning school. However, they do not need to be at odds. It may just be that strategists learn incrementally, making it seem as if the organisation is biding its time. Then, when they have decided on a direction, they quickly move in what may seem like a revolutionary way.

Conclusion to the strategy formulation discussion

As noted with the discussion on culture models, it may be possible to put aspects of the strategy formulation process on continua:

- a CEO-driven vision and goals process moving towards a collective one (which as noted by Trowler (1998) does not absolve the CEO of responsibility: 'Creating a consensual vision of the future doesn't absolve leaders from goal-setting; (p. 143));
- a deliberately planned strategy moving towards an emergent strategy; and so on.

Strategy and HE

One of the areas which the introduction of a new strategy such as blended learning highlights, is strategic planning. While some literature on strategy in HE is emerging (Shattock, 2000; Pidcock, 2001; Allen, 2003), it is relatively thin on the ground. This is interesting in comparison with the case of further education, where a number of articles appeared at around the time that institutions were required to follow a strategic planning process, although

Watson and Crossley (2001) do not feel that in FE it has received enough attention either. Various literature searches using a number of related terms yielded paltry results. Although the planning exercise is required by the funding councils, it has not become part of the institutional culture as noted previously. Being drawn from the commercial, business management environment and following a very planned, linear approach, it does not fit comfortably within current institutional cultures and has not, therefore, been seen as a significant management tool. One additional factor which may contribute to this is that, as Warner and Palfreyman (1996) state, finance is needed to make strategic plans a reality and there is often not much of that in the current environment.

In one of the articles identified on strategic planning in HE (Pidcock 2001), it is stated that although five-year plans are submitted to the funding councils, because the changes facing HE are not only constant but also often conflicting, no one believes that they are of any significance beyond the first year. This would seem a bit dismissive, given that at least a broad-based vision and goals, such as the introduction of distance or blended learning would be enduring enough to be 'managed towards' over a five-year period. Indeed, Hargreaves (1995, p. 218) quotes Wallace and McMahon to support this, stating that 'the social world is non-rational in many respects, but still ordered enough to be subject to a form of rational planning'. In his article on planning in schools, Hargreaves points out that what the clients of the institution (in this case parents of school pupils) want is, despite the constantly changing environment, surprisingly stable. He defines this basically as learning and achieving academically within a happy environment. If something similar to this was the basic guideline for what a university's clients (students) want, it would provide a starting point for planning, no matter what the external shifting forces were.

Stacey (quoted in Pidcock 2001, p. 81) goes even further, when he observes that 'universities tend not to have much in the way of overall visions'. The study showed that communication of new strategic initiatives was a problem - indeed

there was considerable resistance to the 'new managerial culture' which made such an exercise necessary. This may have been because the related issue of staff participation (and therefore one assumes ownership), was so negative. However, there appear to be two major flaws in Pidcock's study. Both of these relate to the difficulties he faced in dealing with the size of the institution. The first is his assumption that he can separate out the academic staff as alone being 'the group most intimately concerned with the university's core purpose' (p.71). The arguments against this assumption have already been dealt with in the earlier section on collegiality. The second is that the study was based on interviews within only one school of an institution, with some triangulation by way of the quality assurance department. This is potentially very misleading, because, as Rumble (1981) noted, the schools within universities can function almost like independent cells. Much is attributable to the leadership of a school head, and therefore it is difficult to extrapolate the attitude of a single school to an entire institution, never mind beyond that boundary.

Hargreaves (1995) uses control theory to describe open-loop (no corrective control) and closed-loop planning (which includes monitoring, feedback and corrective action). In the context of schools, he states that problems can develop if open-loop planning is used for long-term and complex areas where a closed-loop approach is more appropriate and effective. The language of the planning environment in universities is very much that which Hargreaves cites for closed-loop planning: targets, success criteria, action plans. However, he also rightly states that integral parts of the success of this are progress checks, monitoring and adjustment. As can be seen in this thesis from the discussion about implementation, these are the weak areas in higher education planning. However, Hargreaves discusses these systems in the context of schools. The transition of these ideas into the higher education environment is very difficult. For instance, he states that 'the unequivocal duty of the head (and the senior management team) is to assume oversight of the school's monitoring and adjustment systems' (p. 224). It is hard to see the principal of a higher education

system viewing this as a major duty – particularly in a culture of collegialism or individualism. Nevertheless, the issue of implementation has already emerged from the pilot study for this project as being a major problem with the introduction of an innovation such as distance or blended learning, and much of what is noted in Hargreaves's paper is of importance beyond just the school environment. One particular problem with the paper, however, is his characterisation of the school as an entity (for example, on p. 221, he says '[i]f a school cannot give clear answers to these two questions...', and there are other examples). This would seem to provide it with a life other than that of the people who make up the school, and does not fit with, for instance, Greenfield's management model discussed earlier. If the institution is seen too strongly in these terms, it may become too easy for staff to shift the responsibility for implementation away from themselves to some 'entity' called 'the school' or 'the university'.

Other literature which is beginning to emerge on this front focuses not on institutional strategy, but is rather about designing or implementing smaller substrategies within institutions. This ties in with emerging data from other writing, that one of the strategies being used to drive institutions forward is to introduce smaller strategies, such as a teaching and learning strategy, or an IT and communications strategy, etc. (See, for example, Newton, 2003 and Allen 2003.) The use of substrategies chimes with the formal process of the planning school, where large strategies are broken down into substrategies, planned, budgeted for and then brought back together. However, it is not clear from this research that this bringing together approach actually happens. Nor is it clear that the substrategies are a deliberate spin-out from the main strategy.

A recent article by Westera (2004) discusses strategies of educational innovation, dividing the institutional strategy into two distinct categories: substitution and transformation. The substance of this article is that while institutions are resistant to change and follow a pattern-type strategy which

merely tinkers around the edges of innovation, what is required for real educational innovation is transformation. This goes beyond just using the technology, and indicates changes to the very way we think about teaching and learning and many of the structures and organisational processes associated. Westera's ideas fit well with the configuration and learning schools of strategy formulation. This is encapsulated in the following quote:

'during the substitution stage, common practices occur using new technologies, while after some time, the transformation stage is reached, where new technologies induce new practices and old practices disappear.' (p. 509)

Implementation and structure models

Even in institutions where the strategic planning process is strong, the implementation and reporting process is not necessarily well-developed. Plans then have the potential to become merely exercises in writing documents, rather than ongoing working tools in the achievement of the institution's goals. This can be seen in Pidcock's (2001) conclusions that 'one manifest flaw in [New University's] strategic planning process is the lack of formal evaluative mechanisms, nor has any mechanism been devised of the annual updating of the corporate plan' (p.81). While it may be thought that the issue of implementation focuses on operational issues rather than the strategic level which is the prime concern of this research, there is some evidence that the implications of the introduction of blended learning are so radical that it is indeed raised to a strategic level.

There are a number of structural and process models in place relating to the implementation of distance and blended learning.

Model 1

Some institutions have chosen to separate their e-learning or distance learning developments from the core business of the institution, creating an entirely

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separate department or centre from which all these activities are managed – this can include administration, IT support, materials development and production. These systems may be closely interlinked with existing systems or integration may be limited merely to the exchange of enrolment and matriculation information. This approach has the benefit of circumventing some of the more difficult aspects of traditional university management and culture, but cannot necessarily be expected to have any impact on the day-to-day teaching practice of the institution and its staff as a whole. Morrison (1998, p. 41) quotes Kanter on the fact that successful implementation of change involves the need to separate past activities from current and future, i.e. break with the past. This model is not conducive to bringing about this kind of deep-rooted change. Nevertheless, there are a number of supporters of such a ring-fenced model. Prestera and Moller (2001) subscribe to this view, and King (2002) quotes Yetton as favouring the 'independent centre' as the way in which institutions can successfully introduce distance learning. This model has less applicability as more blended learning is used for on-site students, thus narrowing the gap between off-site learning and on-site delivery models.

Model 2

Alternatively, institutions may choose to make distance or blended learning an integral part of their core activity, ensuring that all faculties are involved in some way. This approach avoids the duplication of administrative and other systems, but within the current culture, has a tendency to lead to 'cottage industries' of activity, where departments all try and do everything themselves. King (2002) discusses the fact that innovative developments are often left in the hands of enthusiasts. This, he states, results in strategies which do not lead to mass application. In addition, this institution-wide approach can mean that funds set aside for the development of innovative initiatives are diluted to such an extent that no whole programmes are produced, or that the impact on the institution as a whole is limited (for an example of this, see Brown 2002).

While this may nevertheless be of benefit to on-site students, providing them with flexibility in at least some of their modules, it does mean that any broader goals of off-site delivery to new markets is not achievable in the absence of a complete ‘product’ to offer.

Model 3

Some institutions have chosen to resource a central department to implement and manage the development of distance and blended learning activities for the institution, while maintaining the driving force within the faculties. This has the benefit of allowing faculty to concentrate on preparing the materials without having to provide technical input and liaison between departments. This model also means that emerging good practice and successes are recognised centrally and disseminated more widely, preventing some of the reinvention of the wheel found in the cottage industry model. The tendency with this model is to rely on enthusiasts or ‘champions’ of the new learning mode to take things forward until there is enough critical mass to sustain the development. These champions are needed at all levels of the organisation. However, there must come a point at which this activity is built in to the processes, strategies and goals of the institution, to avoid a slump and possible failure of the entire endeavour due to the departure of these champions (Brown 2002, Jordan and Morris 2002).

The models of introduction and implementation noted above may seem to be about process and structure, but they also indicate attitudinal approaches to blended learning implementation. Boys (2002) posits four different approaches to blended learning implementation within institutions, which fall into two basic groups as follows:

Approach 1 - Comprehensive/additive	Approach 2 - Additive/parallel/autonomous
Conceptualise the problem as the need for	Conceptualise the problem as the need for

rethinking of existing systems	compatibilities between existing systems
Based on redesign of administrative support/learning support/learning and teaching processes and relationships	Based on the additive combining of existing administrative support/learning support/learning and teaching sub-processes
By centring institutional development on debate and negotiation between stakeholders	By centring institutional development on information-sharing and persuasion around uptake
So that the management of change requires methods for reviewing processes through which institutions is currently organised	So that the management of change concerns ways of co-ordinating and communicating with staff
And barriers to change are articulated as the need to resolve conflicts and differences between various stakeholder perspectives	And barriers to change are seen as the need to overcome resistance to new technologies/inertia of existing working practices

(Boys, S. (2002))

One can imagine that models 2 and 3 above could be used as vehicles for the kind of radical change envisioned in the first approach, despite the fact that they are more often aligned to the second. Model 1, on the other hand may achieve the first approach easily within the new division, but is essentially an autonomous approach which will not encourage change within the main institution (Brown 2002). This takes us back to the institution's strategic vision for the introduction of blended or distance learning and what it is trying to achieve. Is a single division achieving good enrolments and significant cashflow running parallel to the rest of the institution's activity a strategic goal, or are there other goals which would be better served by a comprehensive reshaping of the institution's entire practice?

Barriers

Berge and Muilenburg (2002) provide a detailed list of the barriers which they encountered in an investigation of 1, 276 respondents working in higher education institutions which were using distance learning. These are:

- * faculty time and reward
- * organisational change
- * technical expertise and support
- * evaluation and effectiveness
- * student support services
- * quality concerns
- * legal issues
- * feeling threatened by technology
- * access
- * administrative structure.

The range of these categories certainly seems to reinforce the idea that the introduction of distance learning (and following on from our earlier discussions, blended learning as well) touches every area of the institution and therefore has considerable strategic importance.

It is interesting to note that the definition of 'technical expertise' in this study relates largely to pedagogical issues around using a delivery mode other than the classroom, rather than the use of technology.

An interesting issue raised by this study is the assumption of a logical progression through the phases of: no distance learning; sporadic use of distance learning; use of distance learning replicated by teams; stable process and mission critical. One of the ideas which may explain the mismatch between plans and reality in UK HE institutions with regard to distance learning and blended learning, is that this process has not been allowed to happen and goals

for blended and distance learning have been included into strategic plans, thus making them mission critical before the growth phases have been completed.

Despite the usefulness of this study, it does raise some concerns. Perhaps pre-eminent is the fact that it is not clear whether the respondents were given any guidance on a definition of distance learning. So, although background information regarding the survey and the perspective taken was provided by the researchers to participants, it is not known whether a definition of what comprised distance education was included. Indeed, one of the variables that was not eventually included in the categorised results is shown as 'difficulty managing distance-learning classrooms'. This might indicate that the survey takes the view that distributed learning, for example a lecturer being videoed into two or more classrooms simultaneously, a practice commonly found in US distance education, is part of the definition. This poses problems for translation in the UK context, because our conceptualisation of distance learning tends to lean more towards an asynchronous, independent learner model.

Another factor which was classified as not important enough to warrant inclusion was 'lack of professional prestige for distance learning'. It is not explained how this might be interpreted, but if it is intended to mean that staff do not want to get involved because their work is not well recognised in this area, this would be another difference between the US and the UK. In the UK, it might well be that this barrier would be much higher because of the pressure of the Research Assessment Exercise, and the fact that distance learning materials do not count as publications. Hannan (1998. p. 1) seems to be indicating this when he states that for many academics 'their subject remains paramount and their expertise is measured by their research output rather than the quality of learning experience by their students'. The subject being paramount has, of course, implications as well for the coherence of the institution as a corporate entity, as noted in our earlier discussions on culture and structure.

Change management

Change management and techniques for change management (as indicated by Morrison 1998) undoubtedly form an important part of the way in which universities could handle a paradigm shift such as embracing distance and blended learning. However, change management *per se* was not the main focus of the research. Change management, as it is discussed in the literature, is focused around leadership. In order, therefore, to make change management the prime focus of the research, access would have to be gained to the principals of all institutions for some considerable time and in some depth. In practical terms, this was not possible, and the research was, therefore, aimed more at a snapshot of institutional practice and process than specifically at the issues of change management. In addition, Watson and Crossley (2001) state that without longitudinal data, it is impossible to identify the processual dynamics of changing. This is an additional reinforcement of why the research focus cannot be on change management *per se*. The length of time available did not allow for the collection of longitudinal data.

Nevertheless, as can be seen from the strategic planning and implementation discussion earlier in this paper, the idea of change management is integral to the process of introducing distance and blended learning into institutions which have traditionally used classroom-based approaches. In the arena of education, as in other areas, active management of change leads to a far greater likelihood of success than simply introducing new goals and assuming action will follow. One of the areas which the research aimed to investigate, therefore, is what approaches are being taken by management to implement change, and whether they are actively managing the process, or whether activities, incentives and strategies are being adopted on an ad hoc basis.

Conclusions to literature discussion

Despite all the contradictions and uncertainties noted in the preceding discussion, universities are trying to change and adopt new ways of doing things, a ubiquitous one being the introduction of blended learning. As already noted, they are doing this with varying, and often limited success. Through blended learning, we can look at how these institutions see themselves, how they formulate the directions in which they want or need to go and how they move towards implementation; and through understanding these things, we can begin to develop a model which explains the discomforts within each of their particular environments.

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Chapter 4: Research methodology

The pilot study referred to in the introduction to this thesis attempted to formulate the issues being investigated in terms of an assumption about what might be the influential factors in successfully moving an institution from single-mode to dual-mode or blended delivery. However, inconclusive results pointed to the need to take a step back and view the problem from a less formulaic point of view. The original approach to using a qualitative paradigm is no less valid, i.e. the study focuses on 'exploring the nature of particular educational phenomena' and deals with 'unstructured data'.

Grounded theory

Perhaps particularly in the light of this last statement, it was decided that a grounded theory approach which encompasses the idea of investigating an issue, but without specifically formulated presupposition of causes and effect, would allow far more to be discovered about what influences are at work in institutions changing their mode of delivery. The grounded theory approach provides a number of techniques by which information gathered (primarily at interview, although supported by other sources) can be sorted, categorised and built up to form theory. This approach follows that advocated by Greenfield (1973) who, in his proposals for a university model based on the goals of individuals within the institution, states that open-ended inquiry into institutions and how they actually work should be undertaken more often, rather than putting forward theories and models to improve them.

Strauss and Corbin (1998) are very sensitive to the data leading the shape of the research in developing grounded theory. A number of issues arise from this which were incorporated into the design of the research. For instance, initial interviews with senior figures were used to help generate questions. The results of these initial interviews helped define emerging areas of interest, thereafter it

was possible to choose interviewees according to emerging areas, or even because they were notably different in that area - what Strauss and Corbin call sampling along the dimensions of a particular property.

Certainly, the idea of selecting interviewees as a result of emerging data seems to be confirmed by Deem's (2001) work in which she reviews the writing of others in the management area. For instance, she takes one researcher to task because his study relied heavily on interviews with a small number of senior manager-academics and administrators, leading to a one-dimensional picture designed to fit an *a priori* framework. This is much the same basic argument that was raised earlier about Pidcock's (2001) research.

The use of grounded theory had consequences in terms of the early processes of the research. Reliance on issues emerging from the data had enormous bearing on the literature review for the study. Having gone only as far as identifying a research problem (i.e. a mismatch between reality and rhetoric, with no assumptions on cause) in grounded theory terms, it was difficult to get a feel for the areas of literature that need to be covered. Unlike a study which uses the literature to build a case for investigating an hypothesis because other theories are inadequate, or other research done does not deal with the topic adequately, the situation here is that there is very little literature on the broad topic at all - once again, only in related fields. This means that the process of the research is iterative and a lot less linear than might be the case with quantitative or hypothesis-based studies. This has meant that there has been considerable revising of the literature as the study has progressed.

In 'pure' grounded theory, the data should be interpreted entirely without reference to previous literature or ideas and conceptions. There is no doubt, however, that the way in which the study was approached was influenced by previous reading, interviews at the pilot stage and the personal working experiences in institutions of the researcher. It would seem impossible for this

not to be the case for any reasonably well-informed researcher. The originators of grounded theory themselves had considerable disagreement on whether it was possible to rely entirely on the data for the emergence of the categories, ignoring other influences. Indeed it seems a denial of some of the hardwon ground for qualitative research that acknowledges the influence of environment and researcher perspective on data to insist that these influences are not brought to bear to shape the research in any way. This may well reflect the fact that, as a number of commentators have pointed out, grounded theory was set up in a way which was calculated to give it an acceptable face in a research environment which still had a great deal of problems with the qualitative concept and relied almost entirely on a quantitative research paradigm.

As a response to this dichotomy, Pandit (1996) raises the interesting prospect of using the literature to derive a first 'case' and from that a first set of categories. In the project reported in her article, the literature did specifically allow gathering of data of a case study. If this idea is extended to the general literature relevant to the study as discussed previously, original categories for this study would be:

- Indications of a them/us culture between academic and support structures
- Lack of engagement in strategic planning process (largely evidenced by the lack of literature)
- Recognition of blended learning as a catalyst for radical change in institutional approach
- Potential conflict between style, structure and culture required for traditional and blended approaches
- Move towards managerialism.

This provides a way of dealing with the debate about how the influence of literature can be incorporated into grounded theory.

Practicalities of the methodology

As noted by McDonnell *et al.* (2000, p. 384): 'The design of any research study is influenced not just by theoretical but by pragmatic considerations.' In the case of this study, although grounded theory for all the reasons noted above seemed the preferred process, implementing it in the way in which its original advocates had described it proved very difficult. For practicality and efficiency, all requests to institutions were sent out simultaneously. This meant that everyone who wanted to participate did so at the same time, putting enormous pressure on the researcher. Interviewees were essentially doing the researcher a favour, and therefore times were organised for their convenience, rather than the researcher's. Combining this with fitting into the Open University structure resulted in almost an interview a day over an intense couple of months, with little possibility of analysing data before proceeding on to further interviews. While there was some opportunity to tailor questions to some participants to focus slightly more on issues which seem to be emerging (some of which could be described as concepts in grounded theory terms), this is not the same as the structured approach advocated in the grounded theory literature. The pressure of interviews also meant that being able to develop and pursue categories to try and find dimensions as described, for instance in Pandit (1996), as part of the interview process, was not possible.

The case study approach

Recent conferences show that the use of case studies and examples of 'best practice', particularly in the emerging area of e-learning is endemic. Yin (quoted in McDonnell *et al.* 2000, p. 385) declares that a case study approach is useful when

‘ “how” or “why” questions are being posed, when the investigator has little control over events, and when the focus is on a contemporary phenomenon within some real life context’.

In the educational context, Drever (1995) defines a case study as one in which the researcher wishes to provide an in-depth picture of the educational world.

Yin also advocates the use of case studies specifically for management research:

‘Yin’s (1994) emphasis is exactly on this point when he argues that the distinctive need for case studies arises out of quest to understand complex social phenomena such as organisational and managerial processes.’ (Oz, 2004, p.167).

In fact, it is really the design of the research question which Yin (1994) feels directs the researcher to the use of the case study method. This was an issue which, as shown in the Introduction to this thesis, needed to be considerably rethought and reworked. None the less, the question as it was finally posed, fits well with the kind of investigation appropriate for a case study.

With its original roots in grounded theory, rather than a more propositional design, this study seemed to lend itself most appropriately to a broad-based, exploratory case study, rather than an explanatory, illustrative or descriptive one (Yin, 1994). Gillham (2000, p. 2) states that a case study’s fundamental characteristic is that

‘you do not start out with *a priori* theoretical notions...because until you get in there and get hold of your data...you won’t know what theories work best....’

This ties the case study with the kinds of issues grounded theory posed. In contrast, however, even for an exploratory case study, Yin (1994) advocates the preparation of theoretical bases for the study, if not formal propositions, so that data can be linked to those theories or propositions. In fact, the arguments developed in the previous section concerning the difficulty of following a ‘pure’ grounded theory approach provided the starting point of theoretical bases for the case study approach.

One of the problems of using the case study approach, however, is that it is not often possible to theorise from a single case and create a body of knowledge which extends to other institutions. The fact that four separate and detailed case studies are presented in this investigation helped to broaden the perspective and provide a foundation from which to begin to theorise. In addition, as noted by McDonnell *et al.* (2000, p. 387):

'using the accounts of different participants draws upon multiple perspectives – this is an important feature...and can be seen as a form of triangulation. It enables the development of a more complete, holistic and contextural portrayal of real life situations.'

They conclude that:

'the richness of the data obtained through the adoption of multiple perspectives is without doubt the strength of this method.'

In the end, the approach taken, for the theoretical and practical reasons outlined here was a combination of multiple case studies with some elements of grounded theory in terms largely of the detailed coding of the interview data. This meant that, unlike single case studies, more is being done than simply taking snapshots (albeit interesting, very detailed and complex ones) of the institutions, going beyond this to develop some kind of framework which was relevant to more than a single institution. Despite the fact that Yin (1994) draws very specific differences between grounded theory, other qualitative methods and case study research, Oz (2004, p. 167) endorses case studies as vehicles for grounded theory, and goes further: 'Apart from offering a firm basis for novel and for empirically grounded theories, case studies provide valuable insights and richness of information not usually obtained through quantitative methods.'

Chapter 5: Research method

For reasons of time, it was decided to restrict the research to an in-depth look at a limited number of institutions. The research took the form primarily of interview, as it deals with complex issues and feelings, rather than quantifiable data. In the pilot study, it was found that a semi-structured approach worked well, allowing some focus on the important issues, but not restricting the discussion too much. Another important factor has bearing here, and that is that the researcher has considerable ties and in some cases work experience with the institutions under investigation. As McCracken (1988) notes, an intimate relationship with one's own culture in a qualitative research setting, can create not only powerful insights, but also blindness. The semi-structured approach is useful in keeping the researcher focused, providing a degree of objectivity that helps in not steering the discussion too much, becoming defensive or leaping to conclusions. In short, the semi-structured approach helps to 'manufacture distance', as McCracken (1988) calls it – both in the sense of not becoming defensive, but also to avoid merely settling in to discussing issues of mutual interest. Problems of distance, assumption and mutual interest relate to the pitfalls noted by Hockey (1993) both in researching familiar settings and in researching peers. While familiarity causes some problems, as noted by Eisner (1992), total objectivity is difficult, if not impossible to achieve. The inquiry is not necessarily less valuable because of the researcher's involvement.

Hockey (1993) draws a significant distinction between researching in familiar settings and researching as an 'insider'. If one looks at the kind of ethical issues and problems noted by Cohen and Manion (1994) for the 'insider', dealing with, for instance, issues such as when is a casual conversation part of the data, and what should be done about gossip, by and large, this researcher is not currently an insider, but working in familiar settings.

Labaree (2002, p. 101) discusses at some length the literature on 'insiderness' and 'outsiderness', and brings to the fore Deutsch's argument that 'researchers are multiple insiders and outsiders'. This is certainly true in this researcher's case – clearly being an insider in the case of blended learning and of identifying with university employees, but being an outsider in terms of any one institution. Even here the line is slightly blurred, given a history of having worked in two of the institutions for some time and at the edges of others. Labaree (2002) echoes Hockey (1993) in pointing out the potential benefits of being an insider. They might be divided into four categories:

- the value of greater access,
- the value of shared experiences,
- the value of cultural interpretation and
- the value of deeper understanding and clarity of thought.

Consideration of these four aspects emphasises the multiple perspective of the insider/outsider argument. This study, for instance, benefited from some easing of access by virtue of the researcher being known to some of the institutions (though not all at the higher levels), and interviews were greatly facilitated by shared experience and therefore the creation of rapport. There was some degree of the easing of cultural interpretation, particularly in the area of jargon and understanding of the university environment. However, it is not clear that these factors or the researcher's previous experience led in any way to an understanding which would not have been possible for someone coming to the institutions as an outsider. One of the particular issues thrown up by the position of the researcher as insider, as pointed out by Labaree (2002), is that (s)he is in the position of being both the subject of the study and a participant in carrying out the study. By this definition, more clearly than by any other, the researcher of this thesis was not an insider.

None the less, one of the pitfalls of working in a familiar setting may be a tendency to assume things and interpret too quickly, rather than listen and allow the interviewee to shape the information. The semi-structured interview format

was a valuable tool in handling this situation, and every attempt was made to interpret only from the given information and not to read into the situation issues arising from personal experience.

Bassey (1999) notes that educational research carried out by case study should be conducted mainly in its natural context. Although he does not state specifically, one might assume this means by observation. This is less likely to require triangulation of the classic kind. There are obvious problems with interviews in this context, which are very much moments outside of natural context. The need for secondary evidence therefore becomes stronger and so the study used, where provided, university documentation, such as strategic plans, organograms, strategy documents, etc. However, as noted earlier, the primary triangulation is provided by the multiple perspectives obtained from each institution.

Site selection

Six institutions which had participated in the pilot study were asked to increase their involvement by participating in the more detailed study. The number involved was intended to provide the opportunity to investigate institutions at different points in their development of blended learning. In addition, the institutions approached are of differing types (chartered vs. statutory), as well as having differing core focuses (a mixture in varying proportions of teaching and learning and research, and academic and vocationally orientated programmes). Of these institutions, four came forward to participate, and these four provided a good range of the differences noted.

Case selection

Working from the data obtained in the pilot study, the job roles of those to be interviewed were chosen to try and achieve a broad picture of ideas and

activities across the institutions, and to provide a focus from within each institution on identified themes:

- Senior management process for vision and strategy formation
- The relationship between academic and support departments
- The teaching and learning/research tension
- The relationship between the 'centre' and the rest of the institution
- General understanding and participation in the strategy formulation and implementation process
- Mechanisms for progressing blended learning.

An additional factor is the existence in institutions of parallel academic and resourcing committee structures. Although the pilot study showed that these two streams of activity are now beginning to come together in some institutions through what is often called the central management group or similar, they have in the past functioned almost entirely separately with only one or two key figures serving on both. The cross-over of these two areas is brought into much sharper focus with blended learning initiatives (which may use expensive technology which not only has significant resource implications, but also has significant academic implications). It was intended that the cases chosen for interview should highlight any issues arising from this.

Bearing all this in mind, a suggested listing of staff to interview in each institution was:

- Member of senior management team (principal, vice principal, assistant principal).
- Senior resources manager.
- Dean of faculty.
- Head of central computing services.
- Head of any learning and teaching/blended/distance learning unit.
- 2 x heads of department – arts, sciences
- Computer technician
- Learning technology advisor or similar

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- Head of library
- Head of record-keeping/systems
- 2 x lecturers – one active in the area, one not.

This was then slightly modified to fit the individual circumstances of each institution after initial interviews with the senior management figures who were helping to facilitate the research in each institution.

This method helped to avoid the bias that might be introduced by simply providing an open invitation to staff to participate. In this case, only those staff with particular issues that they wished to air might come forward. By asking particular staff to participate, the effects of this were reduced to some extent. Within the case group selected there may still have been an element of self-selection on the basis of strong views (either negative or positive). This could not be avoided, but an attempt has been made within the case studies to draw inferences where specific post-holders or groups of post-holders declined to participate.

As noted previously, the interviews were semi-structured, based on the question set shown in Appendix 3. Interviews were approximately an hour long and tape-recorded and transcribed.

Descriptors

To provide a focus for the beginning of each interview, each participant was provided with a number of brief descriptors of institutional structure, management style and culture. These were not intended to strait-jacket answers, but to provide a starting point from which the discussion could be broadened.

Culture

The descriptions were based on the organisational culture descriptions used by Land (2001) based on Becher, along with an additional culture noted by McNay (1995).

Hierarchical	Authority conferred from above Recognisable chains of command Predetermined regulations and procedures Specified roles Key descriptor: regulation
Collegial	Authority ratified from below Equality of rights in decision-making Decisions exposed to dissent Higher personal discretion Key descriptor: freedom
Anarchical	Authority eroded by personal loyalties Emphasis on individual autonomy Ambiguous goals; pluralistic values Influence based on expertise Key descriptor: fragmentation
Political	Authority deriving from personal power Conflict as a basis for decisions Policies arrived at by compromise Influence derived from interest groups Key descriptor: compromise, short-term
Enterprise	Market driven Professionalism meeting needs of students Flexible general policy framework Student-focused Key descriptor: client-based

Management structures

These were gleaned from the literature (see, for example, Mintzberg, 1979; Mullins, 1993):

- Hierarchical: line management functions producing recognizable chain of command as noted above.
- Matrix: where services are on one axis of the grid and academic groupings are on the other.
- Project management-based: ad hoc teams and groupings are formed from across the institution to bring projects (defined as being specific activities with a start date and end date and deliverables) to fruition. These groupings are disbanded and reformed as projects start and finish.
- Horizontal: self-managed teams assuming full responsibility for cross-functional core processes (in contrast to the project-based teams above). The whole team (rather than individual process owner) is responsible for the achievement of objectives (Ostroff, 1999 as quoted by Taylor, 2003).

Management styles

These were based on the styles described by Chin and Benne (1974).

- Relying on explanation and, therefore, rational, informed decision-making. Key descriptor: logical argument
- Relying on an understanding of the institutional culture and the motivation of staff to align the vision with their needs. Key descriptor: hearts and minds
- Relying on hierarchical authority to force through change. Key descriptor: coercion.

Ethical considerations

Ethics can be described as ‘a matter of principled sensitivity to the rights of others’ (Cohen and Manion 1994, p. 359). These same authors point out seven areas where research can pose ethical problems. These are:

- the nature of the research
- the context for the research
- procedures adopted
- methods of data collection
- the nature of the participants
- type of data collected
- what is to be done with the data.

In the paragraphs which follow, each of these areas is considered in the context of this particular research project.

The nature of the research project itself was cleared with senior management, and did not appear to provide particular problems. Some concerns were expressed that at an institutional level, information might be made available to potentially competing institutions, but reassurances were given that any information published as a result of the study would not allow institutions to be identified in a damaging light. Most institutional representatives were happy to participate on the basis that the information would primarily be used for a thesis.

In terms of the context of the research, most institutions acknowledged that blended learning was an area of interest and one in which they had not necessarily yet solved all their problems. They were, therefore, willing to participate and the context did not throw up particular ethical problems besides those mentioned above.

We can consider procedure on two fronts: first, with the institution as a whole, and secondly, with the individual participants themselves. In order to ensure that the most senior management of each institution was fully informed on the purpose of the study and the way in which it was to be done, the first approach for permission to undertake interviews was made directly to the principals of the institutions (see sample letter in Appendix 2). Once permission had been granted, meetings were held with the principals' nominees to develop together a list of people who would be candidates for interview. These meetings also provided a platform for the institutional representatives to raise any issues which they felt could cause problems from an ethical point of view, such as anonymity, who would have access to the thesis, the tape-recording of interviews, etc. The timeframe of the research was discussed, so that institutions had some idea of when they might expect to see a written report. This is still to be provided to participating institutions.

As a result of the process above, individual participants were reassured that they were participating in an acceptable activity at an institutional level, and were not 'telling tales out of school'. This was an important part of gaining their trust and frank participation. Each participant was provided with an outline of the research question and framework questions before interview (see Appendix 3). While this might have meant that they did a bit of research themselves into the area under discussion, the semi-structured approach and the focus of questions on their perceptions, rather than formal procedures, tried to avoid major bias from this procedure. Indeed, Drever (1995) discussed this as a more ethical approach, because participants can feel as they have a real contribution to make and are not taken uncomfortably by surprise. At a practical level, the provision of the question framework and some background information meant that every interviewee did provide useful data – an important consideration when there was little possibility of pursuing second interviews from a time point of view and also bearing in mind convenience for participants. In addition, the provision of a question framework fulfilled Labaree's (2002) requirement for an upfront

and clearly stated research agenda for those informants with whom there was a previous friendship through work. Although this was a relatively low-risk project in terms of Cohen and Manion's (1994) definition, i.e. there was very little risk of exposure or the forfeit of personal rights, the provision of this information meant that participants were fully informed as to what to expect before participating.

The nature of the participants meant that they were fully competent to make a decision at this point as to whether they wished to participate or not.

The data itself was of the nature of interviews. McCracken (1988) sees what he calls 'long interviews' as an ethical method in and of themselves, because 'this research strategy gives us access to individuals without violating their privacy or testing their patience' (p. 11). In the case of interviews, there is a distinction between anonymity and confidentiality. Anonymity cannot be considered in the same way as would be possible with an unidentified questionnaire, say, because the nature of the data means that the researcher knows who provided it.

However, at each interview, each person was reassured that their contributions would be kept confidential, that there would be no reporting of interviews to senior management, and finally that in any report, their anonymity would be preserved.

In terms of what was to be done with the data, participants were told that it was being gathered primarily for the preparation of a thesis. In addition, it was discussed that a general report would be made available to each particular institution on that institution's own data. This report would preserve the anonymity of participants. This is slightly more problematic within each institution, as it becomes easier to recognise people from such a small, close pool, and therefore even in the thesis, every attempt has been made to avoid identification by virtue of position or title, although in some cases some pointers have been provided where this is germane to the issue being discussed.

All participants accepted the tape-recorder as a means of capturing the interview. However, none of them was offered the option of checking their transcripts. As McCracken (1988), Drever (1995) and others have noted, providing transcripts to interviewees to check can introduce problems in terms of their desire to revise the data provided. In addition, from a practical and cost point of view, this would also have been difficult to achieve in any timeframe which would have kept the interview alive for participants. Only one person expressed a particular desire to view the transcript of his interview, and this was to do with the fact that he wished to have a record of some ideas that he developed during the interview.

At an institutional level, as Cohen and Manion (1994) point out on p. 372, different accounts of the research may have to be presented to different groups. This is not an active deception, but recognition that each may need focus on a different aspect of the research. This is also necessary to fulfil the ethical undertakings provided at the set-up phase of the research. In terms of reporting the data gathered here to each participating institution, this thesis will have to be split up and some of the material modified so that institutions cannot easily be identified and any discussions of common themes do not provide competitor information.

Data analysis

The material from the interviews was treated in a number of different ways. The first iteration of analysis simply grouped all the interview data from a single institution together, and then grouped the answers to specific questions (where these could be clearly identified in the semi-structured format – which proved to be fairly easy). This allowed for broad analysis and identification of trends within institutions, and comparisons across institutions. This process is one that clearly fits with the multiple case study methodology discussed above. This approach allowed the basic structure of a model to be developed (see chapter 8).

A second iteration followed a deeper, more grounded theory approach, coding the interviews line by line. Data was coded both manually and electronically. For the latter purpose, the software qsr-N6 was used. The first interview was analysed on paper, looking at each concept and assigning a descriptor to it. As more interviews were studied, this built up into a collection of headings which were input into qsr as coding nodes. As the process went on, the coding list was expanded and altered as required. In some cases, categories were deleted, in others they were expanded and subcategories added. A code list is shown in Appendix 4. Electronic versions of interviews were then added to the qsr database and the manually noted ideas on them were coded against the nodes. In some cases the text coded was a single sentence, in others the coding was spread over a wider range. In many cases, text units were coded with two or more codes. Expansion of ideas by way of example was not specifically coded, and has not been included in the data shown here for ethical reasons, as these examples were very specific to the institutions involved.

The qsr software also allowed for electronic searching of the data. This seemed a useful starting point for some of the more easily categorised data, such as that arising from questions on hierarchy or management style. However, as the language used is so different across interviews, in actual fact this technique was of limited use and much had to be recoded as a result of this kind of search. Examples of basic searches for 'hierarch***' and 'budget' are shown on the CD which accompanies this thesis. In addition, it is crucial that transcripts are prepared in a way that allows for the best use of the software – for instance, sentences need to be kept short so that they can be used as coding units. In some cases, the interview data for this research was not always suitably typed up, leading to more manual analysis than might have been the case otherwise.

It follows from the issues raised above that much of the thought process took shape while manually coding interviews, and although qsr has the facility for

capturing notes and memos alongside interviews, paper was primarily used for this task. A sample interview section which deals with questions on strategic planning, along with its coding is shown in Appendix 5. Ideas which occurred on reading the text are illustrated in this example in the form of annotations to the text enclosed in chevrons. Additional sample coded texts are available on the CD which accompanies this thesis, as are illustrative examples of text searches.

When writing up the research, quotations were chosen with two main but contrasting ideas: either they stood out as being different from what others had said or (more often) they encapsulated succinctly a trend which was emerging from the data in fragmented form by a number of participants. In addition, every effort was made to use quotations which would not lead easily to identification of the participant or the institution.

The iterative manual and electronic coding process outlined above ensured great familiarity with the data as a coherent whole.

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Chapter 6: Case study analysis

In this chapter a case study approach is taken to each institution. General information is provided about each institution, and then the discussion focuses on these areas in each:

- structure, management style and culture
- vision, goals and planning
- the blended learning agenda and strategies to encourage it
- drivers and tensions.

Institution 1:

Old, chartered

Nine people were asked for interview. Appointments were made with vice principal (learning and teaching); director and depute director of teaching, learning and assessment in the School of Education; lecturer/learning advisor, media and technology services; director, media and technology services. Refusals were received from two members of senior management:

'I have read through your doctoral research document, and I don't think I am best placed to meet your requirements for interview. I am a member of [the management group], but our main focus is the "bread and butter" applications such as HR, payroll, student record, etc. My involvement in strategic management as it relates to learning is nill'

and

'I am relatively new to the University and my responses to some of these questions would be highly subjective. I do not believe that I can be of very much help to you at this stage.'

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Given the level of the personnel involved, particularly the latter who had been in post for a number of months, the implication is that the strategic planning process is a very restrictive, top-down one.

Structure, management style and culture

Of the small number of people coming forward for interview, the majority felt that the institution was a matrix structure, while one felt that it had moved from more collegial to slightly more hierarchical, but then proceeded to explain that although there was an hierarchy on paper, no one would ever choose to use their positions in that way.

'It is quite clear how much power now resides with the heads of college...in fact I'm sure that the heads of college wouldn't wish to exercise that power in the sort of way in which their opposite numbers in some kinds of private institutions and public institutions might be expected to.'

There was, however, a lot of focus on individuals, rather than on the institution as a whole, and this was in fact expressed almost as an aspiration – people are encouraged to be innovative, different, even maverick.

'We always have people who do their own thing because that's what an institution of this nature is like...'

and from another participant

'...academic activities are much more individualistic, research and teaching are quite individualistic.'

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The participants felt that the management style was a combination of hearts and minds and rational approaches. All said definitely not coercion, and this was borne out by later examples of how the institution manages change, planning, etc. However, one participant did start off by saying that the style was 'pretty much one of total anarchy'.

The influence of the principal was felt in a political way. All participants related this very much to the culture of the institution, which without exception was classified as primarily political. In some cases this was an instant judgement, in others it initially was described as a combination of cultures, but finally resolved towards the political.

'[I]t seems to hit this, what you've got here as the political thing, conflict as a basis for decisions, compromise short-term because that's what you can actually get on with and do...'

This political culture makes sense, given the concentration on individuals, and the lack of will or interest in using the hierarchy to drive through new ideas. This also fits with the committee structure which is strong in this institution. In fact, the participants who did come forward for interview all gave a very clear mental picture of the image of the institution, which was articulated often by statements such as 'In a place like this' or 'in a traditional institution like ours'. One participant said:

'I think in general there's a pretty strongly shared but unwritten, undocumented culture within this university, actually in the same ways I think that there are in all old research universities....'

So, in some ways, although this culture has all sorts of difficulties if one wants to foster change, it is strong and provides a definite identity for those who work within it.

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Vision, goals and planning

This institution's vision is decided at senior management level, although it was not entirely clear whether it was the principal alone, or a discussion group.

'I assume that it's formulated by a small senior management group.'

The quotes at the beginning of this section from senior staff members clearly show that it is a very small group which participates in this activity. The vision is couched in very general terms, and is not seen by participants to articulate anything very new about the institution or its goals, but merely to state succinctly what most people in the institution believe anyway. Blended learning has no real role to play in this vision, with participants stressing the fact that the institution will focus on being campus-based and continuing along its traditional path, with research-led teaching and a major research focus. None the less, the mechanisms and services are being put in place to make it possible for those who wish it to use elearning for their students, and indeed one participant who acts both in the academic and in the support arena stressed the fact that this sort of individual development had already been going on for some time (once again, this fits with the very individual focus of the culture).

Planning in this institution is inextricably bound up with budgeting. Nearly every question which related to planning was answered with a reference to budgets. The planning process did not emerge clearly from discussions, although it seemed that there were negotiations and plans (budgets) developed at school level and then passed up to a senior management group for approval. Large budgets are devolved to the schools, whose heads are then able to divide it up among smaller divisions and departments. None the less, it seems that budgets are by and large incremental over the previous year, with little room for

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manoeuvre, although one interviewee did feel that some flexibility had been introduced in the current planning round.

The blended learning agenda and strategies to encourage it

The principal does hold a brief for blended learning in this institution, particularly as it relates to learning and teaching on-site. There is no particular focus on distance learning, although some departments have an interest in doing this. Once again, the very individual nature of developments comes into focus. There does not seem to be any attempt to 'institutionalise' the approach, or control it in any way through guidelines, quality procedures, etc. For instance, when it came to the seed-funding discussed below, one participant said:

'you've got all this money, and it can all go to people doing their own thing in their own department so they don't have to talk to each other....'

The focus as noted by the interviewees (and this will relate very much to their roles as support staff of varying kinds), was very much on getting the systems in place so that they work efficiently, and then letting academic staff use them as and when they wished, with assistance from the centre or not.

'There's no corporate style for it, all we do is we provide tools. So, in a sense, providing WebCT provides a standardised environment with... a quality assurance process; in other words it should stand up 24 by 7, the navigation will always work, it provides you a set of tools which will work, et cetera but what you put in it's entirely up to you.'

There is a high tolerance for differing systems, although staff are being gently encouraged to conform by the fact that only one main VLE will be resourced and supported centrally. The fact that no academic staff came forward to be

interviewed would seem to confirm that this is not a priority interest for them. So – making the systems available is one strategy.

Another quite high profile strategy has been the availability of seed-funding from a fund set up by the principal to encourage elearning developments. This also has an element of conformity attached to it, in that any materials produced from the funds are required to be placed in a central repository as institutional assets. The focus of this money seemed to be entirely on academic developments, and only one infrastructure project was set up – to create the repository. This, of course, has led to frustrations on the part of the staff working to support these developments, and in many ways, another strategy has been that of using champions, such as the support staff, and relying on their proactive nature to carry the development forward.

Drivers and tensions

This institution does not have pressing financial drivers or student recruitment drivers, and can therefore continue without the need for radical change. The main driver in this institution is research, and this leads to some tensions with teaching and learning. Encouraging a new development like blended learning creates problems because it takes the focus away from research, and may seem to put too much emphasis on teaching and learning.

'Yes, research is very much ...which doesn't mean there isn't excellence in learning and teaching, but it's much more of a spare time activity because you're here to get on with your research.'

Institution 2

University College

The principal of this institution made contact almost immediately to say that the interviews could proceed and copied this to a senior manager with a request to contact the researcher. None the less, the researcher had to do the follow up.

A meeting was arranged with the senior manager who provided contact information for the job roles outlined for the study. He agreed to contact potential participants and discuss whether they would be willing to participate. A list of names of those who had agreed to interview was subsequently passed to the researcher who emailed them directly with the outline in Appendix 3. When contacted, two of these people claimed not to have had any conversation with the senior manager at all. This was an early indicator of a communication issue which was strongly raised by every interviewee from the institution.

Interviews were finally held with:

Learning and teaching advisor, dean of educational practice and quality assurance and member of senior management team, computer technician, head of centre for academic practice, librarian, dean of faculty, head of school, assistant registrar.

This institution was interesting in that nearly every interview had to be rescheduled at least once after the appointment was made, and one of the two which was not was about half an hour late. On discussion about this with one interview candidate, it seemed that there is an inability within the institution to say 'no'. This is further explored in the 'Thematic analysis' chapter.

Structure, management style and culture

The management structure was described variously as hierarchical, hierarchical with self-managed teams, project based and matrix management. The style was described by everyone as being hierarchical (some saying even to the point of coercion), with a bit of rational argument - emphasised by the senior figures in the sample. This is very different from other institutions in the study. The senior management team member said:

'The style is intended to be one of rational explanation. But staff might feel that there is some coercion.'

This viewpoint was confirmed by a dean:

'It's certainly not the last one which is hierarchical authority, although no doubt some staff would like to tell you that that's what it feels like.'

Other members of staff confirmed their suspicions:

'I think the aim would be to go for the first one, logical argument. I think the reality is it's probably number three [hierarchical authority and coercion].'

And

'When there's a key change...it's hierarchical. The decision has been made by the principal...Many of the what I would call the front-line soldiers feel like they are very disempowered.'

Culture was described as having shifted from a more collegial one to being primarily hierarchical. A number of respondents also singled out the enterprise

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culture as being an aspirational one, but one which had not yet been achieved. The senior management team member commented that he could see elements of all the cultures at different times and places in the institution. He made the interesting observation that it might be useful to recognise all of these and why and when they were in place, so at least staff new at any one time what culture they were working in. Two people described the culture as being anarchic, with one expressing considerable surprise that this was finally the one that seemed to come through most strongly.

None the less, other indicators in many of the interviews showed that staff were more accepting of a 'new managerial' approach than in other institutions:

'I think in the new university, because of the vocational nature of their programmes, I don't think there's such resistance to that idea of a managerial or new managerialism in the sector.'

Indeed, the use of arguments such as student-centredness, indicate Trowler's (1998) 'soft managerialism'.

The problem was described not as resentment of a managerial culture, but more that of management expertise:

'It's not that we object to having managers...it's just they don't really seem to know what they're doing.'

And from another participant:

'...we don't have experienced managers, and it's a problem that's sector-wide again, a lot of the managers that we have are great academics...but they're not people-people. They don't know how to manage academics and they don't know how to manage admin. staff either.'

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And finally:

'I don't feel that there's...anything close to an holistic approach being developed just yet, and that has to be down to the individual managers being much more managerial. I never thought I'd hear myself say that. I think it has to be...I think they have to lead and I think they have to explain.'

This ties in with the arguments in the literature review around problems with the learning school of strategy formulation and the importance of middle managers in allowing institutions to learn from and formalise new ways of carrying out activities. This problem is also reflected in institution 3, where the view is taken that because of their other responsibilities and often their academic focus, managers are 'part-time'.

Clearly, this institution is experiencing some discomfort trying to work out exactly what it is and how it would like to operate. This may be the result of a kind of leadership vacuum caused by an extended period of absence of the previous principal, then a period of interim leadership while a new principal was recruited and finally the time taken for the new principal to settle in (and see note under vision and goals about subsequent issues).

Vision, goals and planning

There was considerable focus on the new principal when it came to vision and goals for the institution. At the higher levels, the new focus of the principal on research (a complete change from the service culture of the institution which was the focus at the time the interviews were set up) was felt at least to be a clear direction, if not a universally popularly embraced one. However, at lower levels it was felt that there had been a surge of enthusiasm and goodwill with

the arrival of the new principal and that had not been capitalised upon by senior management. It was felt that the moment for change, new direction and increased motivation had been lost. In some cases there was also deep scepticism about pushing the institution away from its current core business which is focused on courses certified by professional bodies and other quite vocationally oriented programmes towards a more research focus.

The strategic planning process was viewed as very much a top-down, directive approach. It was also seen as primarily about satisfying what one respondent called 'the only stakeholder they recognise', the funding council. Two respondents said that there was lack of clarity about the mission and vision for the institution, and these two and two others agreed that it was a reactive process to external political factors, rather than a visionary process about the institution itself. In fact, one participant said:

'And that expression [tick the boxes] you've just used is one that someone told me that [this institution] was noted for.'

The strategy did not reflect the changed priorities being focused on in the vision. For instance, a dean said:

'[the strategic priorities] come from the executive and although they have been tweaked over the past year or two, by and large remain the same – increasing student numbers, increasing income generation.'

What seems to be an emerging trend was also that the planning process was intimately tied up with budgeting, but not in a facilitative way. So, one person noted:

'I suppose we are going through that strategic planning process and we will be arguing that, but I'm

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not convinced that sufficient resource will be made available.'

A member of support staff felt the process was as follows:

'I think they prepare the strategy and then make a case for getting any necessary monies.'

This problem has been recognised, and some attempt is being made to address it - a senior management figure said:

'We're just firming up on the final targets. ...And this year a much clearer link of budgets to try to get over this problem of agreeing something in principle but without the resources to achieve it.'

The blended learning agenda and strategies to encourage it

The development of smaller strategies in this institution was mentioned, in particular, the learning, teaching and assessment strategy was prominent. While this strategy does not specifically focus on blended learning, it is seen by senior management to imply that this will be done:

'...what we've said is the implication is that some of the targets that we've set can only be achieved if we adopt approaches like [blended learning] because there's no other way of delivering it. So it's almost an implicit that we've said about changing learning styles.'

In order to focus on the new direction of research (and, many believe, to considerably reduce the strain on resources), the staff of this institution have been given a specific target of reducing contact time with students by half. This has focused many of them on distance and blended learning initiatives, although

this is not necessarily a hard target *per se*. Some issues around this will be dealt with in the discussion.

The teaching, learning and assessment strategy document is quite different from many in that it also includes a detailed implementation and action plan and is viewed by senior management as being an instrument of change in itself. A key player in this implementation plan is the central educational development unit which advises and supports staff working with both traditional and non-traditional learning modes. This unit was mentioned by nearly every respondent in a favourable light, and is clearly an enormous influence in the area of blended learning.

Another strategy being considered is the formal use of ‘champions’ who, rather than arising simply through taking up the activity, will have a specific, although not yet fully defined role. These have not been put in place yet.

Drivers and tensions

The main driver in this institution is financial, as noted by every participant. However, an attempt to disguise this has caused deep discomfort in the institution. This situation seems to have been created by senior management themselves. A member of senior management explained:

‘I think it’s easier, much more easy to motivate academic staff if you talk about the learner-centred strategy. They’re not interested in, in fact they’re sceptical of the financial drivers. But on the other hand, when we’re trying to sell investment, I mean, I suppose we’re manipulating the message, you might say.’

This seems to be what has caused the confusion about management styles and the intense discomfort around them. Senior management is aiming at rational

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argument, and indeed has many arguments around why there is a financial imperative for efficiency, less class contact time, etc. However, they cannot present this argument to staff because they are trying to persuade staff that the argument is a learner-centred one. There is a sense of distrust throughout the institution, senior management not trusting in their staff's ability to deal with some of the financial realities, and staff feeling that they are being given less than the truth. This seeps through in many interviews with people saying things like:

'I think what you're hearing from some staff is we can find sort of pedagogical argument, yes, but please be truthful with us and say it's actually a financially driven model, not a pedagogical model, or if you genuinely think it's a pedagogical model, then state that and say you'll support it wholeheartedly with money.'

And

'There's not been enough debate at the low levels for them to buy in'.

Finally, one participant put it quite baldly:

'I think they're put forward as a pedagogical benefit very strongly by some people. But I think the underlying thing is financial.'

At least three interviewees mentioned that there was a problem in the institution with decision-making, with many decisions being passed over or delayed. This came across as the kind of 'garbage can' environment described by Cohen and Marsh (1994) where things are put off until they resolve themselves, go away or become a crisis. Alongside this problem was an issue of communication, mentioned in some way by most participants as something which was not well

done in the institution. In this researcher's view, the main reasons for this tension have been discussed above.

Finally, there did not appear to be tension between the teaching and learning agenda and that of research in this institution. This reflects their current focus on professional courses and programmes. However, as noted above, tensions could develop in all sorts of directions with the principal's new direction being more focused on research, and the fact that there are limited funds. As one participant in the library noted, for instance:

'There is never a chance on God's earth that we will ever begin to aspire to being anything resembling a research library...not unless they start bringing in vast amounts of money'.

As a result, primarily it seemed of lack of reasoned debate and real communication, this institution seemed to be showing more discomfort than any of the institutions investigated. One participant described it thus:

'I mean, the main thing is there's a lack of strategy, a lack of deployment of that strategy, a lack of engagement with staff about that strategy, lack of staff development related to that strategy and that's not criticism, that's life, and there's a tremendous feeling of disempowerment, frustration amongst many of the foot soldiers.'

Institution 3

Newer, chartered

Interviewees at this institution came forward thick and fast, possibly as a result of the insistence of the person organising the institution's participation that all the names of potential participants should be circulated in a long list that all

could see, and also because he explicitly got the vice principal's go-ahead, including the inclusion of his name on the list. This would already seem to indicate quite a political slant to the culture of the institution. Interviews were conducted with the vice principal, assistant registrar (learning strategies); head of educational development unit; director of computing services; professor in the chemistry dept. and manager of an online learning programme; lecturer and director of teaching and learning in the school of engineering and physical sciences; director of finance; dep. principal for resources; director of planning.

This institution has a long history of elearning and distance learning projects. However, it recently made the decision to commercialise this activity and has created a spinoff company which is intended to work with all universities to produce and market learning materials. The spinout was partly funded through the a government body. This has meant that all the staff with experience in this area have moved away from university control. Although there is pressure from senior management on projects to use this service because it is related to the institution, which obviously wants to see it succeed, there is a sense of immobilisation in the institution. In fact, one respondent told me that people were only considering on-site blended developments at this stage because they did not understand how to proceed with distance learning projects. Every respondent mentioned this development. Drivers for it were viewed primarily as being financial, with positive but doubtful comments such as:

'it seemed a good opportunity for the university to
capitalise on its experience'

to negative ones:

'they just couldn't say no to the money, and didn't
think it through'.

Structure, management style and culture

Generally speaking, everyone in this institution described it as having a matrix-type structure with the academic departments across one dimension of the matrix, and the support departments across the other. This matrix structure was seen by one participant as an active structure created as a result of a recent major restructuring. This respondent described it as a

'plug and socket structure, with functions at the centre being mirrored in the schools'.

A different view was taken by another participant who felt that:

'none of these structures except very locally in separate parts of the university, have necessarily evolved or been created to deal with all the learning issues. They arose because of other issues possibly'.

Some also mentioned project management based around teams and one dissenter saw it as project based, but not around project teams, rather around ad hoc committee structures. The structure appears quite fragmented in the sense noted by Rumble (1981) with the schools (albeit now large groupings of what used to be smaller departments) with a great deal of autonomy on how they manage themselves. Some schools have chosen to create a micro-version of the matrix structure within themselves, and some have stuck to the departmental structure which existed before their amalgamation. Most people would comment only on their own area and mentioned that the differences between the way the schools did things were potentially so great that they could not shed light further afield. The structure seemed divorced from any real line management function in the institution, with one participant stating:

'There is an element of people knowing what the sort of pecking order is, but there is not the sort of dynamic line management....'

There were strong feelings about style, because the previous senior management (a couple of years back now) had been very top down and was seen in many ways as dictatorial. Everyone pointed out that things had now changed to a more rational approach with a bit of winning hearts and minds thrown in. There was a definite sense that people needed to own strategies and plans if they were to work. However, the director of planning described the institution as:

' "administered", rather than managed. It is very rule-based and decisions are made within regulations (both internal and external). This fits best with a negotiated and explained/debated style.'

This was confirmed by others:

'We now, at least, have the potential for it to be more sort of managed if you like, or administered if you want to use that phrase',

and

'While I use the word managerial, in many ways the university remains an administrative institution.'

This interviewee did not see the institution as being actively managed in a certain direction by the senior management team. Another participant stated that

'.....there's not much coercion, the schools have a good image of academic units, have a good deal of

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independence and the control that the academic centre has is relatively limited, I think...’.

There were some echoes of the same issue which had such focus in institution 2 where questions were raised about the managerial expertise of academic staff – one participant from a support department explained it this way:

‘...to some extent the management is , now how do I say this, it is voluntary and it is part-time, apart from the principal....All the senior managers have come up through the academic route ... so it is seen, how do I say this, as a promotional, an honorary position....’

This is also a problem because of the multiple hats that these managers wear. The participant goes on to say

‘They still have their research, they have still got their teaching and [the vice principal] would jealously guard the right to do that....’

The culture was described as being primarily a combination of collegial and political, although the vice principal said that it had moved from a collegial/less managerial culture to a less collegial/more managerial culture. The political dimension was strongly mentioned by most participants, with one describing the institution as ‘tribal’. One person described it directly in terms of the literature:

‘But in fact what happens in committees, you know, the Becher stuff, the backstage, front stage, onto stage. We get all the backstage lobbying before it all happens in the committees.’

The culture would appear to be very strong because of the time served by many staff:

'We have a high percentage of very long serving members of staff. Staff have been here and they like the place, but then that builds up the culture with it, and so that then becomes an inbuilt resistance to change.'

In the view of this participant, this placed more of a burden on the management style:

'people will need more evidence and more convincing, because they feel part of the bricks if you like.'

One respondent who had joined the institution in the last two years from a commercial environment felt that it bordered on anarchic. It was extremely difficult to get decisions made, and if they were and certain staff did not like the decisions, they found numerous ways of undermining them. This climate of undermining decisions which were not pleasing was confirmed by other participants, and this researcher's own experience of working within the institution. The very independent nature of the schools in the structure of this institution strengthens the collegial culture and reinforces this ability to ignore or undermine difficult decisions.

It became clear from the interviews that there were problems with decision-making within the institution, with a seeming need for complete agreement before a decision is made. A number of examples were given showing that very senior managers and the principal did not make use of any kind of authority to confirm a majority decision. One dissenter could delay or scupper initiatives.

Vision, goals and planning

The vision in this institution has recently been restated, and is once again stated as a very general one:

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'there was nothing radical about that, in the sense that we are just reaffirming that we are involved in research and education and teaching'

and

'we do send a draft mission and vision statement which were an update on things that had been in the charter for years and years and years'.

However, many people feel that this vision is not clear enough, leading to comments like:

'But we are still unsure of exactly what the institution is, what kind of students it wants to produce'

and

'there is a view in the university [that] the plan is not well understood in the university'.

Another participant stated:

'There is not a consistent ambition, it is patchy.
...There isn't a clear lead from the top.'

One participant put the blame for this the door of the process of strategic review, stating that it had been 'by no means perfect in its implementation'.

Finally, one senior participant stated:

'It may be that in some ways we have failed to articulate ... what are the wider strategic perspectives beyond the good business plan'.

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None of the interviewees mentioned specific goals for the institution. There are a number of smaller strategies being developed in the areas of teaching and learning, IT and research. It appears that only recently has the system for a strategic plan for SFC included these smaller strategies which have been developed on a more consensual basis.

At an institutional level, the vice principal described the strategic plan as being mostly to fulfil funding council requirements and stated that the plan was not well understood with no ownership or recognition that the institution itself actually needed it. However, he and the planning director agreed that there is currently a concerted effort in the institution to develop strategic thinking and to rise above business planning to more expansive, long-term planning. It seemed to be a kind of goal from management that the strategy should be kept very flexible so that it can 'react to circumstance'. While this is a move away from the design school type of strategy formulation process, there do not appear to be any real mechanisms in place to create and capture an emergent strategy. The principal and a small group of senior staff are still the main strategists. This flexibility was often interpreted as vagueness and left staff to wonder what indeed the strategies and goals were.

At a more micro level, the planning process itself is quite well established, with a very bottom up focus, coming up through departments and schools and to the senior management group where the plans are all drawn together.

'[I]t is all of that information which is currently being synthesised into the draft budget, the draft strategy and that is what [the senior management team] will get the opportunity to help to debate.'

Note here the close correlation between budget and strategy. This was picked up again by another person who said that the process wasn't really about planning, it was about budgeting. One person (again, the one from a commercial background) felt that there was no real strategic planning process at all; there was a process where schools said what they wanted to do and budgets were allocated. He felt there was no strategic framework against which to judge decisions about where to allocate budget in the face of many requests.

A lecturer described the relationship between budgeting and planning as follows:

Interviewer: So the plan comes first and then the budget?

Participant: No they have to mesh. You cannot propose developing a distance-learning programme without a business model being adopted there. You have to look at how much this is going to cost before you do it. How many additional students are you going to get: How much are you going to charge?

Interviewer: And once you have done that, do you then ask for budget? Or is the budget kind of set and you have got to fit into it?

Participant: The budget is set for each of the schools, as I understand it, it is based on its proportion of the income that the university gets.

Under this understanding, the costing-type exercise seem redundant and the budget is based on retrospective activity, rather than planned activity.

Despite it being well established, it is recognised that the planning system is not generally felt to be coping with current needs, and there are plans to modify it to a more dynamic one:

'we're moving from a process really where strategy was almost kind of retro-fit which is a traditional way of doing things to a new approach which is more inclusive, more easily communicable'.

This is causing some disruption in the institution as people feel that the fundamental culture and value of current activities are being questioned.

The blended learning agenda and strategies to encourage it

In this institution, goals for blended and distance learning are subsets of the learning and teaching strategy, a parallel strategy which has recently been developed with lots of consultation and negotiation. The strategy is couched in very broad terms under four main headings: sustainable growth, enhancing learning and teaching, student learning experience and institutional environment. Although blended learning is not specifically mentioned, most respondents felt it was an intrinsic part of the 'enhancing learning and teaching' and 'institutional environment' strands of this new strategy. One senior participant stated the institution's goals in this areas as:

'we should seek to develop our continuing interest in commercial off-campus learning. This should go in tandem with a steady move towards mobile or open learning on campus. That is what I understand is our strategy at the highest level'.

However, it is still at very early stages, with no institution-wide VLE yet established, and ongoing debate about the financing of such a venture. A pilot project was initiated from within a school and

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'the university approved, was aware of that development, and set up various working parties to monitor [it]. Because of that now we are in the middle of having to decide whether to make the investment across the university.'

The mechanisms for making this kind of decision are not clear.

'Now we are at the point where the university has to make one of those big decisions....how they are going to resolve that I do not know.'

In this case, it appears that the lack of specific vision and goals discussed above is creating difficulty because there is no framework within which decision-making of this nature can be made. The independence of the academic schools and the system of very little top-slicing means that if consensus cannot be reached, this kind of university-wide initiative which requires investment by each school from their current budgets, is very difficult to implement.

The development of the teaching and learning strategy was led by the teaching and learning board which was created in the recent restructuring. This board is made up of the learning directors of all the schools and heads of service groups, and is seen as an active way of bridging the gap between academic and support areas of the institution. However, institutional documentation shows some confusion about how this board integrates with other institutional structures and whether it has decision-making or merely advisory capacity. A separate group, a sub-group of the Information Systems and Technology strategy group is looking at an institutional virtual learning environment. One of the strategies used to further interest in this area was the running of a conference for staff on blended learning, and there are plans to run another, more prestigious and externally focused one. An additional strategy is the creation and strengthening of a central educational development unit which is charged with working in the area of

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elearning as well as a number of other areas which are seen as important, such as employability and wider access.

Drivers and tensions

Finance in this institution is a major driver of change. As the undergraduate student numbers are capped and there is a funds deficit, if the institution wishes to bring in more income, it will need to do so in different ways from what it has traditionally done, by focusing its efforts on postgraduates, overseas students and more flexible offerings to students. Another driver for blended learning in this institution is perceived competition and image, particularly in the area of using new technologies. Some participants feel that the institution is falling behind in terms of its provision of communication and information technology facilities for students, despite having had a reputation for being at the cutting edge in the past.

'I think we recognised that the university's position was becoming much more average...in terms of the good things like the number of computers per student, the integration of networks....'.

There is some evidence in this institution of tension between the 'centre' and the schools. This is shown by many of the respondents talking about 'the university'; 'it decides', etc. This points to a lack of ownership of some policies, but also confirms the strength of the schools in this very collegial model, with the central support areas being seen as reactive 'servicers' of the schools' needs. In the area of blended learning which draws together the academic and support strands of the institution so closely, this can cause serious problems. One example given by the head of the central computing department was this:

'... we discovered that they were running an exam for 200 students in that lab on Wednesday afternoon for two hours. They did that, it wasn't 200, it was more

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like 60, and then they said: "OK you have had your time now, would all you students now print off your submissions." And there was one printer.... It is a classic and of course no one had thought about that.'

Finally, this institution also feels the tension between research and teaching and learning, and has some fears that too much focus on an elearning strategy will dilute the current focus on research.

'One of the biggest areas of contention, actually, in the articulation of our strategy... was ongoing debate as to the extent which the university strategy was research led and how that reconciled with the emphasis of the teaching in general.'

And from a member of the senior management group:

'The cultural difficulty with the university is the risk that it's seen to be anti-research which of course it's not but there's a risk because in the environment where success in research is a key competitive parameter between universities, there's a risk that, or the perceived risk that if we emphasise the importance of teaching, we might compromise our position as a research university.'

Also note the competitive element to this quote, which was touched on as one of the institution's drivers above.

Institution 4

Statutory

At this institution, the following personnel were interviewed: vice principal, head of library, director of registry, head of school of communication, senior

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lecturer business school, head of education development, a learning technologist and the head of the business school.

At the time of the interviews, the institution had recently appointed a new principal, and the vice principal had been in post for only a couple of years.

Structure, management style and culture

The structure of the institution was described primarily as hierarchical. The vice principal saw this as a problem, and felt that in order to achieve things, one had to go around the hierarchy. This statement from a vice principal once again reinforces the trend noted in previous institutions that the organisational structure is not about line management in universities, not even in a statutory one. This was confirmed by another interviewee who noted that:

'In terms of signing off procedures, for example, it is very hierarchical.'

As noted before, then, it seems that the structure is about arrangement of departments, and processes and procedures, but not about management per se. Another interviewee declared:

'There is a chain of command that starts at the top...that governs day to day activities and I think the problem is that it only governs day-to-day activities. It either isn't capable or is never inspired to do anything other than keep the ball rolling.'

One person described the structure as matrix

'but by accident because of the fact of academic schools and support services, not by design'.

Two people described the culture as tribal. This description would seem to indicate that there is some political jostling going on as well and that there are strong groupings within the institution. One person added that there were elements of project management in the structure.

In terms of management style, it was felt that there was a combination of the rational decision-making and winning the hearts and minds of staff. One person described this as an active attempt on the part of the institution to

'move to a clear understanding of institutional culture and strategy.'

It was felt that there had been a shift in the institution, from hierarchical to 'more consultative, more organic'.

'There is now a greater realisation that [we] are the university... and if things need to be done differently then a lot of that solution is actually in our own hands, and I think that's the kind of approach that's being pushed down from on high.'

This statement clearly shows the combination of hierarchy and sense of authority from the top, as well as a recognition of the need for proactivity throughout the institution. One senior management participant felt very strongly that there was a lack of understanding about the institution's values which affected the success of this style:

'I think hearts and minds as well might more easily be directed if people had a common understanding of the values for which the institution stood.'

In terms of culture, in the interview sample there is little agreement. One participant felt that the hierarchical structure was very strongly reflected, while

some felt that there were aspects of collegiality. Collegiality was mentioned most often in its least attractive sense, rather than as a positive force:

'there are a large chunk of academics who still basically do what they want to do and don't feel that we...that anything that's said is either relevant or mandatory, and I think the autonomy...when you're trying to bring in something which is a sea change...would go dead against that.'

Probably the strongest culture to emerge was that entrepreneurial. In one participant's view, there were:

'...a lot of entrepreneurial aspects and that focus, the flexibility, the client-based which is still a major part of our impetus now, every time, you know, a strategic review comes round in a circle, it comes back to being student-focused, customer-focused, market driven, we really need to be more entrepreneurial in generating income and so on and so on and that's a massive part of the culture here.'

This focus on customer needs and an enterprise culture was felt to be at least part of the institutional culture by another five participants. The combination of hierarchy and entrepreneurial cultures can be a difficult one:

'The hierarchical and the enterprise together are not an easy mix, and I think that causes tension as an institution in terms of moving forward to take on new big projects like getting into elearning.'

This is picked up again later in the 'Thematic analysis' chapter.

Vision, goals and planning

Staff in this institution feel that they receive a very strong steer from senior management on the goals of the institution. There is also a sense of vision:

'We were steered very much by the principal's vision
that as an institution we want to grow....'

However, in this year of change with a new principal at the helm, there is a sense that the messages from senior management are changing too often as new evidence and information comes to light and the planning process has been drawn out over too long a period as schools and departments try to incorporate these into their plans.

'It's almost, you know, oh we should have told you about that earlier but we forgot about it kind of stuff coming down from on high, so there's a lack of precision, I think, in direction. We all know where the university is going, we all know what all of the strategic directions for the university are...so we know exactly where the goalposts are in the distance, but I just get the feeling that this one year, and it might just be because this is such a transformational year, that we are just being messed around a little bit....'

Besides this steer, the process of planning was by and large described as a consultative one. Senior management set up specific goals within a broad strategy. Schools and departments then formulated plans which would take them (in whatever way they saw fit) towards those fixed points. Two people felt that this kind of planning system led to a 'tick the box' kind of approach at school level. In this year of transition, there was slightly less opportunity to communicate than before, with a key meeting at which schools and departments usually discussed their plans with each other and members of senior

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management not taking place. A number of participants felt that this had weakened what had been a good system, but were willing to wait and see whether it was just a 'blip' that year as a result of the management change. The vice principal clearly had a lot of felt presence in the planning activity, while the new principal had not as much. Participants were unsure of whether this indicated 'quietly successful leadership' or lack of leadership.

The budget/resource allocation model in this institution is seen as problematic, because it is not facilitative of the fairly radical changes being sought by senior management and being incorporated into plans by schools and departments.

'We don't have a resource allocation model that makes sense, and so what we do every year is we do an incremental version of last year's budget....'

Some participants did feel that this was changing for the better:

'...we're getting better at delivering fund to operational plans. I mean, I've been here four years, and the first couple of years I felt like we went through a whole planning process and we all ended up with the same amount of money we had before....'

The blended learning agenda and strategies to encourage it

Blended learning has a strong role within this institution as a catalyst for change as part of a growth strategy which is very specific in terms of targets to be achieved.

'I think [the VLE] which is probably the main change driver for academic staff has really changed delivery and enabled staff to move things forward in a huge step change....'

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Some staff feel that this push is too fast ‘the institution’s headlong rush into elearning’, and some are excited by the change:

‘moving forward to take our new big projects, like getting into elearning and blended learning in the way that [the vice principal’s] vision has for that, which I find tremendously exciting...’

from a head of school.

In terms of the blended learning and distance learning agenda, the institution has been very focused on blended learning for onsite students, although it also has some large distance-learning projects. The vice principal felt that the biggest cultural problem in this institution was from senior management’s unwillingness to engage with the ideas and implications of elearning. However, there were specific change strategies in place to encourage staff engagement: an international conference was organised recently, staff were given the tools to work with and only when they got interested enough and asked ‘this is all very well, but what’s it for’ were *ad hoc* groupings set up to formalise direction.

Strategies also include seed funding and identification of programmes which will have a wide impact for conversion to a blended approach, and a requirement that all modules should have some basic online presence. Some discomfort has been experienced here, with two members of staff who were interviewed describing this as a completely top-down command.

‘It’s very, very rare but there was a dictat went out saying that you shall do this.’

Another strategy to encourage blended learning has been to strengthen the educational development unit which assists staff across the institution to work with blended learning.

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Drivers and tensions

One of the drivers in this institution is finance as the funding council income drops. The vision for growth is also driving the institution, as is a perceived benefit from a shift to blended learning as a quality enhancement, customer-satisfaction tool. Teaching and learning are seen as the institution's primary function, which allows considerable focus on blended learning initiatives, and there has not emerged from any of the interviews so far any major conflict with a research agenda. There is some evidence of tension between the centre and academic units, but this tension relates primarily to what is sometimes perceived as the 'directive' nature of the senior management, rather than between support departments and academic ones.

'Having worked in other institutions, what's quite nice about [this one] is that service departments and academic departments actually do work very closely together....'

A heads group has been convened by the vice principal at which all heads both academic and support meet on a regular basis. Initially, it appears that academic heads did not see the need for meeting in this format, but have since accepted that it is a good forum for networking. This strategy is claimed to have closed to a certain extent the understanding gap between academic and support arms of the institution.

Chapter 7: Thematic analysis

The data has been presented so far primarily as case study data. However, as noted in the methodology section it has also been analysed and coded as a coherent group of information. As noted in the chapter on methodology, a number of possible themes emerged from using literature as a 'first case'. These were:

- Indications of a them/us culture between academic and support structures
- Lack of engagement in strategic planning process (largely evidenced by the lack of literature)
- Recognition of blended learning as a catalyst for radical change in institutional approach
- Potential conflict between style, structure and culture required for traditional and blended approaches
- Move towards managerialism.

These themes provided the starting point for a thematic analysis, and led to recognition of a number of trends across institutions which are discussed below.

Fragmentation and planning

The refrain of fragmentation of institutions has implications for the planning process. As Hargreaves (1995, p, 224) states, in schools where development planning takes the form of a corporate plan, it does make a difference. Although he does not discuss what his definition of a corporate plan is, if it is assumed that he means a business-like model where goals are clear, and everyone in the organisation is striving towards them, the fragmentation of higher education institutions calls into question the possibility of ever achieving planning which 'makes a difference'. It also makes the role of the leadership much more onerous, as they have to cope also with keeping these different factions moving

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together. As noted by Trowler (1998, p.152): 'Top-down approaches suffer from the bind that in order to be effective, they require the kind of conditions they are trying to bring about to already be established.'

The fragmentation of institutions has important ramifications for any aspirations they may have to be seen as learning institutions. As noted by Mintzberg *et al* (1998) on p. 218, 'To make [the learning model] work, is needed communication, involvement and a deep commitment to working across organisational boundaries.' As discussions on the fragmentation of university structure and culture show, and as indeed the interview data is reflecting, as desirable as the learning school may seem to be for a large professional organisation which, as Mintzberg says, has no central authority with the power to impose strategy on the whole organisation, it is not in fact the model which is being actively practised by institutions.

The separation of organisational structure and management function

An emerging trend from all four organisations had been the way in which organisational structure is specifically divorced from any line management function by many of the participants. The interview evidence shows that the hierarchy is merely a device to show the institution's formal groupings and in some cases it is seen as being about process and procedures. While some people recognise the potential of the structure to include line management, they choose not to use it that way (see, for instance institution 4 where the structure is more about procedures). In some cases, the reverse is true. People recognise that the structure does not confer line management responsibility on them, but they do still have considerable management power, as this quote from the vice-principal of institution 1 illustrates: 'I have zero line management responsibilities and in the strictest sense not much power, but it would be ridiculous for me not to acknowledge that I have a significant amount of power.' This person recognised

the political nature of this statement, which clearly illustrates that it is to the less precise indicators of management style and institutional culture that we must turn for information on how the institution is actually managed.

The emergence of budget as a critical factor

Another interesting point emerging from the results above is the issue of budget towards achieving strategic goals. This was not an area which the researcher initially set out to investigate. This is an area of institutional management cloaked in as much darkness as that of strategic planning itself. Literature searches with wording like 'budget allocation in universities'; 'financial management'; 'resource allocation in universities'; 'resource allocation models', etc. have yielded no results from the HE arena.

Morrison (1998, p. 36) quotes Owen, who states that if payments reward retrospectively (i.e. for achievements) rather than provide incentives for the achievement of future goals, strategies tend not to materialise. Even where seed funding is used as a change strategy, it is reported by participants that there is not enough of a long-term approach to allow for the integration of these activities at some point into the core business of the institution. As noted by Hargreaves (1995), seed-funding as a strategy is useful only with careful monitoring or it has the potential to be a serious drain on resources with little success.

There may also be hidden issues relating to the teaching and learning culture involved with the constantly mentioned problem of resourcing. Blended learning as an add-on, as a support tool, has been said to be extremely expensive. Cost-benefits can be gained only if the whole system is regeared to its use. In one institution, one strategic decision could have benefited so much from the freeing up of classroom space in each subject of only one hour a week, one participant reported, that the introduction of a VLE and all the training and

staffing it would require could easily have been financed. A win-win situation, it seemed. But academic staff could not agree that a VLE was really that beneficial and that their current teaching model really needed changing. So the idea was and still is delayed – both projects being put in difficulties in the process.

The importance of specific goals for blended learning implementation

Earlier in this thesis, we discussed implementation models for blended and distance learning. One of these, model 1 (a ring-fenced, separate area of activity), remains a distinct model. However, the others indicate a continuum of models distinguished by varying degrees of control and central input, and dictated by institutional vision and goals. For instance, in the case of blended and distance learning, the place on the continuum will be decided by whether the institution is focusing on radically altering the experience of all their students, or whether they are focusing on providing certain students with more flexible options, or whether they are focusing on accessing new markets and so on. Thus, although this may seem like an implementation issue, it is crucial that institutions are very clear about their goals in the area of blended learning, and also that the management ‘concentrate on specific practices and concrete innovations rather than...spend time on developing strategies’ (Morrison 1998, p. 37). As noted, however, only one institution has very clearly stated goals and targets for blended learning. The goals of the other two who wish to move in this direction, are implicit, rather than explicit, and there is an assumption on the part of management that staff will interpret the vision and very vague strategy to include the use of blended and possibly distance learning initiatives. This encourages school-based activity which is not necessarily efficient and does not take the institution forward in a strategic and managed way.

Emerging new structures

There is in some institutions a recognition that the divide between academic and support areas is not facilitative for blended learning. This has led to the creation of new structures to unify these parts of the institution. In two institutions, for instance, new fora have been created at middle management level to facilitate discussion and possibly decision-making (although this is less certain). In addition, as pedagogic issues and technological issues are raised and there is more focus on teaching and learning, central facilitating units (often called an education development unit or similar) are coming to the fore. In some ways, this reflects some of the points noted by Davies and Morgan (1983) about the need for filtering units and the creation of new structures in times of great change. Even where structures have remained the same, membership has been broadened to include far more cross-institutional representation. At a more micro-level, most participants have also noted that the teams being put together for programme development are broader (or there is at least a realisation that they should be...). Some people noted that this better communication has led to more respect between central services and academic units. Despite this positive note, these developments are not without their problems, particularly where there is a strong collegial culture which focuses on the academic part of the institution and devalues the contribution of the other parts of it. In institutions with a strong research emphasis, the creation of these structures may lead to discomfort about the way the institution values learning and teaching against research and may also lead to a feeling that the balance between the academy and 'the centre'/management and services is being shifted too far towards the centre.

Some of these structures have grown up from a project-management based approach, or have changed organically without necessarily being formally procedurised which may have implications in the future for sustainability of the change.

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Using champions

The use of champions has emerged as possibly the most common strategy for change in the area of blended learning. However, it can be seen from the overview of the learning school in the literature review, that there are potential problems with championing. One of them is that senior management also have to be part of the learning strategy because they will judge the strategic worth of activities presented to them by their current knowledge and experience. If there is a mismatch with what has been happening at the coalface, the innovation may not receive the recognition it is due – it may not fit within the senior management ‘map’. They cannot use an analytical process to create this knowledge for a new situation/environment. Indeed, this would seem to be the case given the number of times in the interview data that interviewees actually practising blended learning lament the fact that they cannot get senior management to recognise the time, resource, support, etc. needed for their activities. This may also be a manifestation of the problem of management expertise that has been noted in some institutions. This may cause champions to leave the institution and, as Brown (2002) reports, the activities they have developed towards achieving stated institutional strategy then slow down or fail entirely.

Sub-strategies

Partial strategies, rather than the institutional strategic plan, are emerging to provide direction. This is the case in all four institutions surveyed, and may come about as a result of the fact that the institutional plan has no real ownership within the institution. With the possible exception of one institution, strategic planning is seen not as a visionary, motivational and directional tool, but as fulfilment of funding council requirements and a basis for budget discussions. It is still primarily a political instrument in which ‘boxes can be

ticked': wider access, blended learning, employability, retention, whatever issues are of current government concern.

The smaller strategies do show, however, that in the current climate of change and financial restriction, there is a recognition that institutions cannot necessarily carry on as before. If the institutional strategy is not the vehicle to encapsulate this change, the smaller, often better negotiated strategies are. In particular, the teaching and learning strategy is being used as an important consultation vehicle which staff can buy into, as reflected in the literature now emerging (for example, Newton 2003, and Wistera 2004). However, there is not always a mechanism or procedure for incorporating these strategies into a coherent institutional strategy. Rather than one framework against which to make priority decisions (albeit very complex ones), staff may have a broad, but vague institutional strategy, a teaching, learning and assessment strategy and an information technology strategy to take into account and understandably are confused, suffer from initiative fatigue and feel that they are being asked to do everything at once.

The tension between research and teaching and learning

There is a constant tension between research requirements and teaching recognition (and blended/and distance learning initiatives fall into this category). This seems to be particularly relevant for the younger, chartered institution which seems to be caught between two stools – neither an old, established research institution, nor a newer, more teaching-focused one. Even the production of a teaching and learning strategy was contentious in this institution because it might be seen as putting too much emphasis on this and drawing focus away from research. In this institution, the financial director expressed the view that at a strategic level one should question how much research should be done, whether it really brought in more money than teaching, and where efforts should best be focused, as the institution is under quite severe

financial constraints. However, the culture of the institution is such that this issue is not one that is ever open for debate. One institution feels that their strongest researchers are also their most involved teachers...on the other hand, this is the newest of the universities under investigation which has never had a particularly strong research focus.

The separation of organisational culture and teaching and learning culture

Organisation culture came across in the interviews as an identifiable entity which functioned across the institution. The culture was for many people about the way groups interacted with each other in the institution, and the way in which management and staff interacted – it was about ‘the way we do things around here’ at a kind of macro level.

In contrast to this, questions about blended learning elicited responses which indicated that there was another culture functioning at a more micro level – a teaching and learning culture. This was specifically about how the teaching environment was seen, what traditions and beliefs surrounded it in an institution and what the institution’s history was in this area. This separation of the teaching and learning culture from the institutional culture follows if we study the tensions which came through in the interview evidence and how they differed across institutions. In those institutions which focused on research, there was a significant problem with a focus on teaching and learning – meaning that there was no real focus on a teaching culture. Indeed, there are few areas in the interview evidence for these institutions where specific teaching practice is mentioned. In the other two institutions, where teaching is already a stronger focus, there are numerous mentions of approaches to teaching, for example: ‘...lecturers who have traditionally thought about the curriculum content as the starting point and then assessment, so we’re asking them to really start again and rethink what they’re doing....’ And ‘There’s a module

descriptor but how they deliver within that is pretty much up to them so long as they meet the outcomes and external examiners are satisfied....'

Of course, whether or not there is a focus on teaching and learning culture, an institutional culture exists. It makes sense, then, that there is some separation between these two ideas. In the institutions where there is a focus on this micro-culture, the broad institutional culture acts as an umbrella for the way in which resistance or acceptance of an institutional goal in the area of teaching and learning is treated. In other institutions we need to make assumptions about the teaching and learning culture from within the institutional culture (see for instance our earlier discussion about the collegial model which concentrates so specifically on the academic parts of the institution).

In an institution which shows anarchical traits, a breach of the teaching and learning culture may just be ignored, while, for instance, in a political culture, groupings will quickly arise to counter the change. Where the teaching and learning culture is broadly accepting of different modes of learning, other factors will be more critical to the success of blended learning (budget, for instance, or the management of time and reward structures).

Blended learning and phases of activity

From the surface point of view of blended learning, the issues being experienced by institutions seem very much to sit with the barriers and stages noted by Berge and Muilenberg (2001). It would appear that for the first institution, at the very early stages of contemplating incorporating a new teaching approach, the activities are centred around seeking staff input, developing strategy and finding out what models might be appropriate. The fourth institution is ostensibly further down the road of using distance and blended learning, and activities there are about seeding projects, training and action plans. More detailed costing and development issues appear regularly in

the fourth institution, while the nature of the institution itself is of more concern in the first. The second institution is more in the middle, with systems already in place and some change already going on. Their concerns are about the motivation for making these changes and on a practical level, the resources and integration of support and administrative systems. The third institution is also at the very early stages of deciding in which direction it wishes to go and is also grappling with organisational change issues.

This accords with Berge and Muilenberg's data that the organisational change barrier is perceived to be extremely important at the initial adoption stages. Concerns about the models of student support and the shape of related services were also more important in the earlier stages (being reflected, for instance, by the concern with models of implementation and the centralised/decentralised argument). They found that concerns about blended learning expertise rose up the ranks at later stages, as did issues about quality. This is reflected here by the fourth institution.

However, although they may have been using distance and blended learning techniques for some time in a cottage-industry way across the institution, institutions one, two and three do not appear to be any closer to having a managed process for the shift. As noted previously, their strategies are vague and blended learning is implicit rather than explicit. Perhaps, as noted by Elwood and Leyden (2000), because of their collegial nature, incrementalism and drift are the only factors moving institutions 1 and 3 towards change. Institution 2, which has a far more managed culture is focusing on the principal's new agenda for research.

Despite some surface correlation between the data gathered in this study and the Berge and Muilenberg study, the organisational culture that they focus on so much would appear to be at the more micro-level of teaching and learning culture. As we noted above, while this adds to the complication of

implementation of a major change, there are more fundamental and deep-rooted characteristics of the institution which facilitate or hinder change.

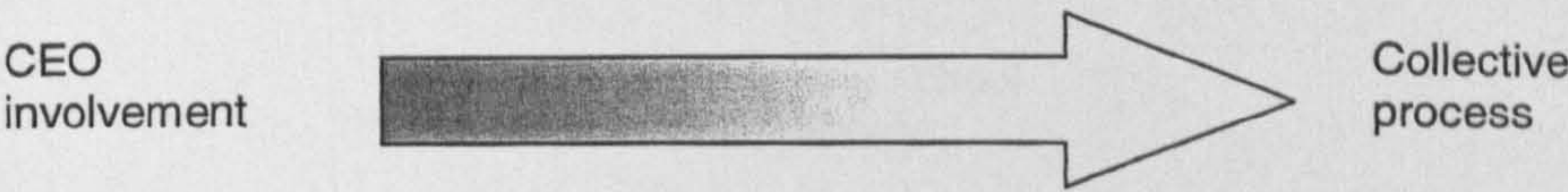
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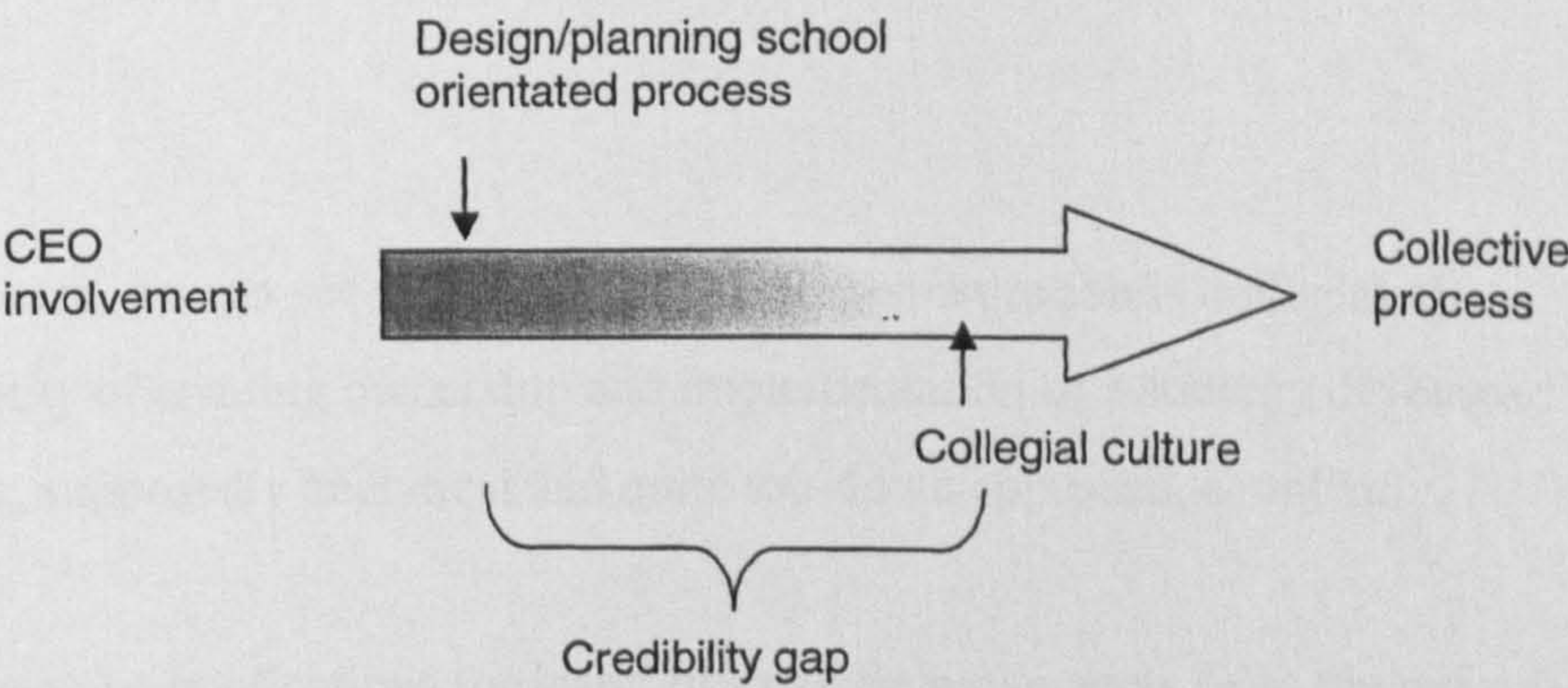
Chapter 8: Conclusion – an analytical model for the organisational development of HEIs and some ideas on application and further research

Creating the model

The literature discussion about strategy formulation indicates that it would be possible to set strategy along a number of continua. A first one might be the continuum of CEO as architect of the strategy. As Mintzberg *et al.* (1998) state on p. 287: ‘Indeed, as we have moved through the schools of thinking on strategy, the power of the central strategist has diminished.’



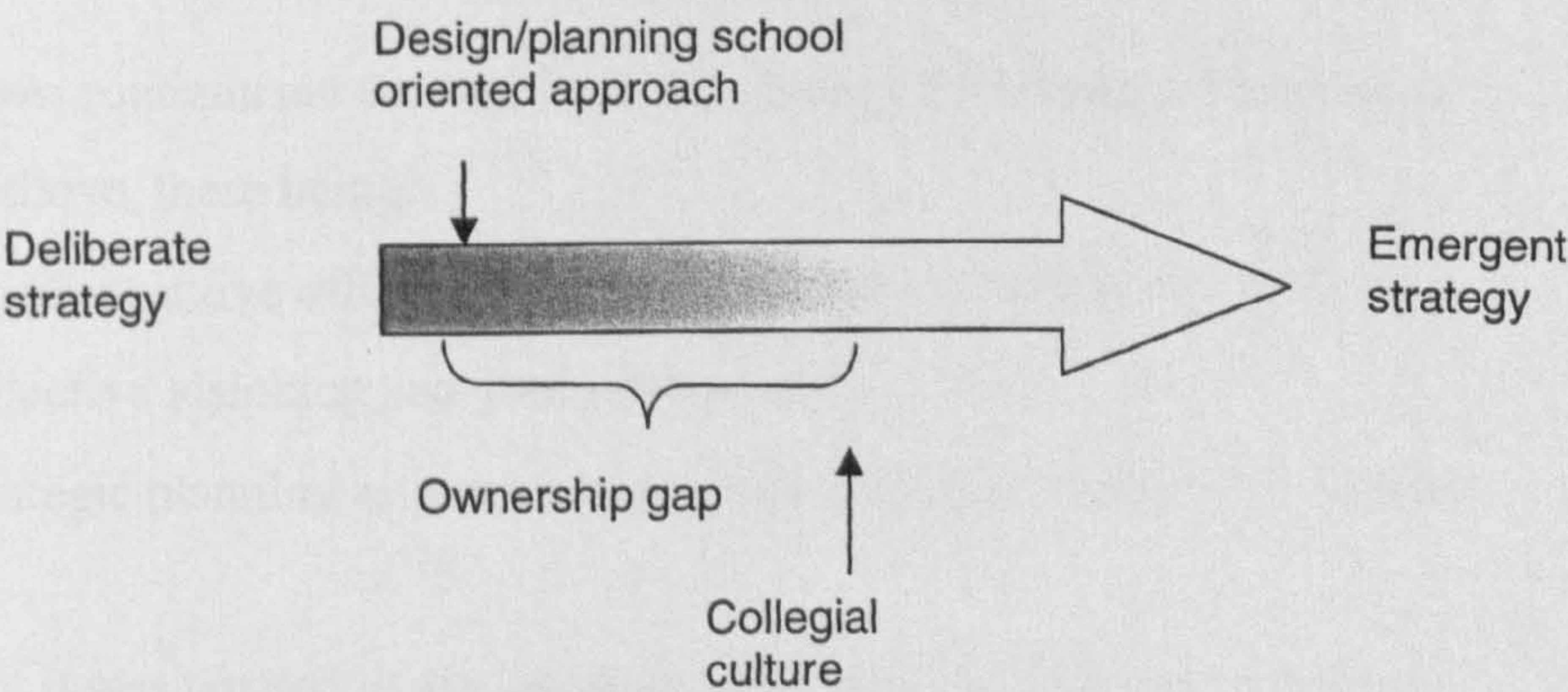
If the data emerging from interviews as the process of strategic planning is plotted against the culture of the institutions as described in the literature and interviews, there is an interesting mismatch.



It may be that it is this mismatch which leads to the feeling described by Hancock and Hellowell (2003) of mistrust which they found in middle managers at a case study university:

‘In the case study university, central “senior” management may, it is alleged by our interviewees, not be fully frank with “middle” management about certain things, e.g. how...it makes its real policy decisions.’ (p. 8)

If we put the schools of strategic thinking on a different kind of continuum, to do with to what degree strategy is presented as a deliberate, decided direction, there is a similar gap:



In this case, we can see that if the culture of the institution is collegial, the possibility of creating ownership and implementation of a strategy developed by a linear, supposedly analytical and quite top-down approach, is unlikely.

There may be implications for institutions as we move away from the process-orientated models towards more emergent ones for their relationships with the funding councils. These councils have, in many ways, forced the institutions to

adopt planning models and processes which do not sit comfortably with their culture. This is evidenced by the way in which institutions use the strategic planning process to 'tick the boxes' and keep themselves onside the political agenda, but do not recognise the strategic plan as a useful institutional roadmap. The trick will be to fulfil funding council requirements while still practising a strategic process which has relevance for the institution.

Building on these ideas and the earlier discussion in the literature review, a number of continua can be identified on which to map the data so far uncovered.

The first continuum is vision. As we have seen from the interview data, vision for institution ranges from a very static restatement of basic principles to an agenda for radical change.

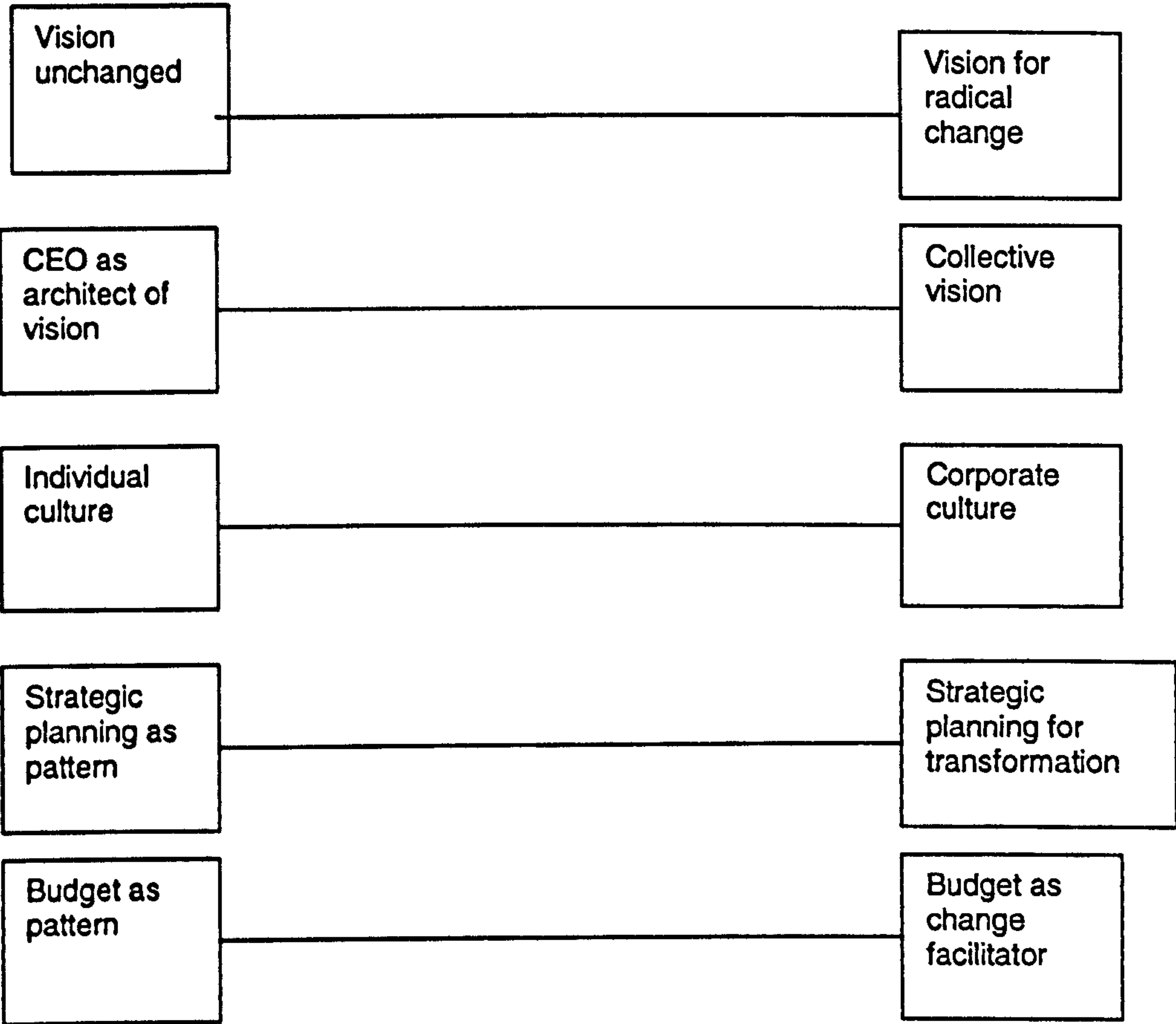
The next two continua are derived from the strategy formulation literature as discussed above, these being:

- Chief executive officer/principal as architect of vision and goals to collective visioning and goal setting; and
- Strategic planning as pattern to strategic planning to facilitate change.

In addition, it was posited in the literature review that a continuum could be established for culture ranging from one focused on individuals through to a corporate culture. This particular continuum also has implications for the visibility of the leadership. In the individual culture, it is expected that individuals take responsibility for their own activities. There is no strong sense of the organisation as an entity and therefore little sense in which people feel the need for leadership which actively manages strategy and processes. However, as we move towards a more joint enterprise which is gaining some identity as more than merely the sum of its individuals, the need for visible leadership and joint decision-making grows. This does not mean that the leader

functions as an autocrat. Indeed, as we move across the continuum, the need for leadership to guide but not dictate collective visioning and goal-setting becomes more important.

In this way, we create model which can be depicted as follows:



On this model, we can plot the position of each feature of a particular institution. From the existing interview data, it would appear that where the institutional positions line up on the vertical axis, there is little discomfort in the organisation. However, where the positions are misaligned, discomforts of various sorts can be expected. For instance, as noted in our earlier discussion, if the vision for the institution is about change and the culture is collegial or moving towards the corporate, but the planning regime is largely pattern or in the formal planning mould, there will be a discomfort where people feel that they do not have ownership of the strategy. If there is a strategic agenda for change, but the budgeting system is largely retrospective and about pattern, we can expect that frustration will result as people try to fulfil goals with insufficient resources.

One feature that is not reflected in the cultural continuum is that of 'anarchy'. This was mentioned a number of times in the interview data for quite a few institutions. However, it is the opinion of this researcher that anarchy can take various forms and represents a reaction to a mismatch on the model, rather than a culture in and of itself. As one interviewee put it:

'I think anarchical is what I feel...That could be also about where they are in the process of change.... I think it's a reflection of the phase they're at, rather than it being a cultural definition.'

Applying the model

The data gathered from the interviews was assessed to allow each institution to be positioned on the model. The kind of information informing judgements about positioning on each continuum is shown in the table below. Overall, however, there is clearly an element of subjectivity in the exact position of each element. Tighter calibration of each continuum with more specific positioning indicators is an area which would bear further work and investigation.

Continuum	Indicators to left of center-line	Indicators to right of central line
Vision	words similar to: 'nothing much has changed'; 'we reaffirmed what we've said for ages'; 'it's a pretty general statement that doesn't change much'	interviewees using words such as: 'there's a push towards...'; 'recognise the need for significant development'; 'we're in the middle of a period of change'.
CEO involvement	Indicators that only a small group are involved in forming policy; indicators that even relatively senior staff do not participate; statements from staff indicating non-participation or low levels of knowledge on processes relating to planning issues; indicators that plans are simply for fulfilling funding council requirements; indications that rulings emerge from CEO or other senior staff that are not negotiated but require action	Indicators of reiterative planning processes; indicators from staff of various levels of planning discussion; indications of negotiation among departments; indication of negotiation with co-ordinators of planning process; negotiated change and participative roles for staff in discussing and managing change
Culture	Directly from responses	Directly from responses

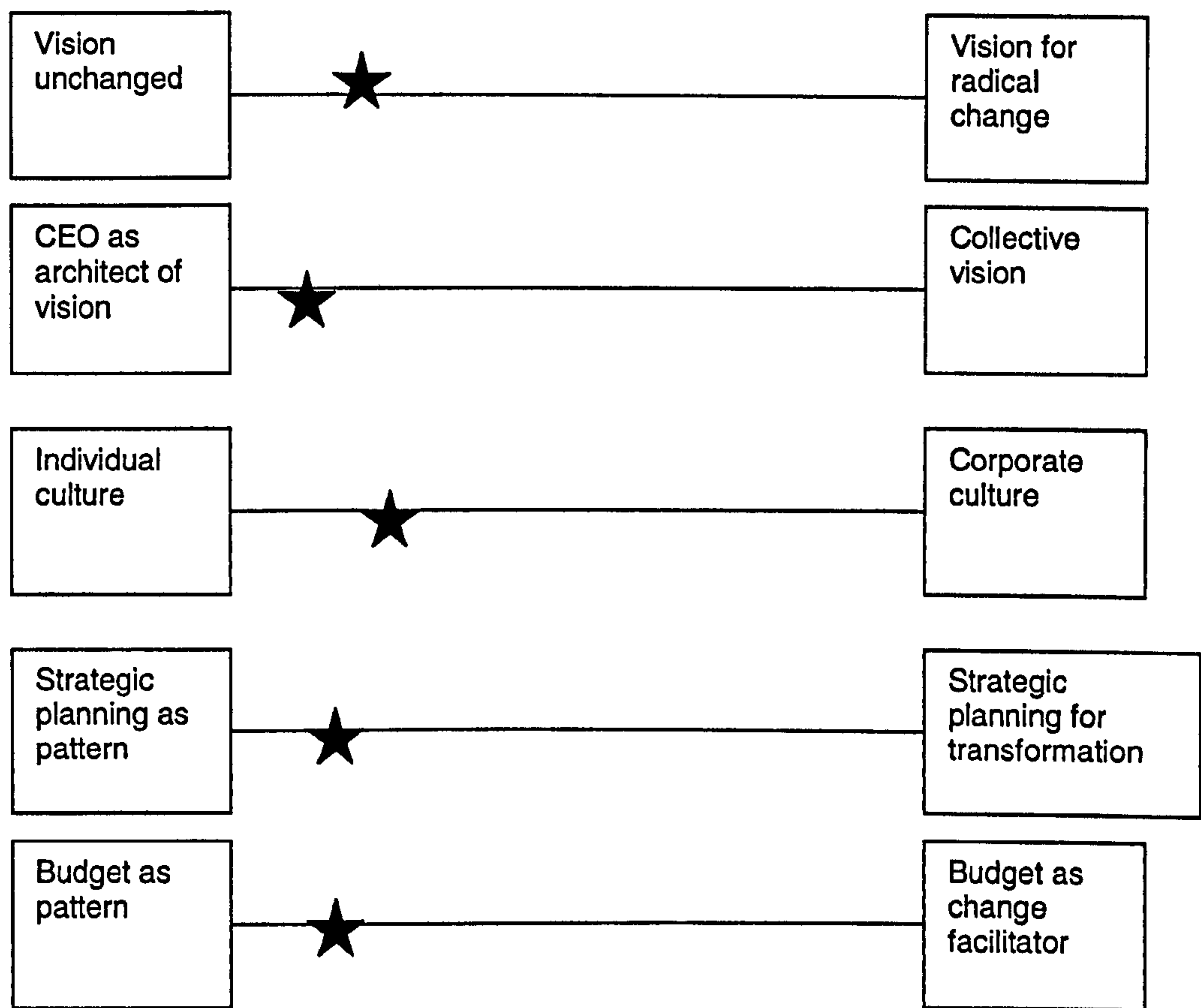
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	<p>to questions asking for categorisation of culture showing anarchical traits or political ones;</p> <p>descriptions which emphasise individual autonomy of lecturers and departments;</p> <p>indicators of them/us</p> <p>division between academic and professional staff;</p> <p>structural descriptors focusing on hierararchical features but excluding management as a factor;</p> <p>indicators of administered, rather than managed environment;</p> <p>indicators that participation in initiatives is voluntary.</p>	<p>to questions asking for categorisation of culture showing collegial traits moving towards an enterprise culture;</p> <p>descriptions of structure focusing on matrix or project management;</p> <p>indications of some recognition of need for managed environment;</p> <p>indicators of active involvement of senior management in steering change.</p>
Strategic planning	<p>Indications that planning tends to repeat year on year; synonomous use of budgets and plans which simply add on an inflation factor; little strength in feedback and report-back loops; little indication of</p>	<p>Requirements for departments to align with vision;</p> <p>requirements to include strategies for change in plans; indications of reiterative, negotiated planning process;</p> <p>relatively strong</p>

	accountability for progress	feedback and report-back loops; indications of accountability for progress
Budget	Budgets and planning treated as synonymous; indicators that only inflation changes are considered; statements indicating limited information for budgeting; statements indicating difficulty in releasing funds for new projects	Indicators that budget can be obtained for new activity; indicators that the budgeting system and information is changing; indicators that budget and planning are aligned (rather than synonomous)

Using the above indicators as a broad guideline, and based on the indicators in the interviews for each institution, each institution is depicted on the model in the pages which follow.

Institution 1 might look as follows:



There is no strong driver in this institution for change, as it is well resourced and has no student recruitment problems. Planning is pattern and almost inseparable from budget which is also pattern. The culture is very individualistic with strong elements of a political dimension. The vision basically holds to the traditional focus that the institution has had for some time. This means that there is almost complete alignment along the vertical axis. This institution does not show major discomfort (perhaps hence the fact that not many felt strongly enough to participate).

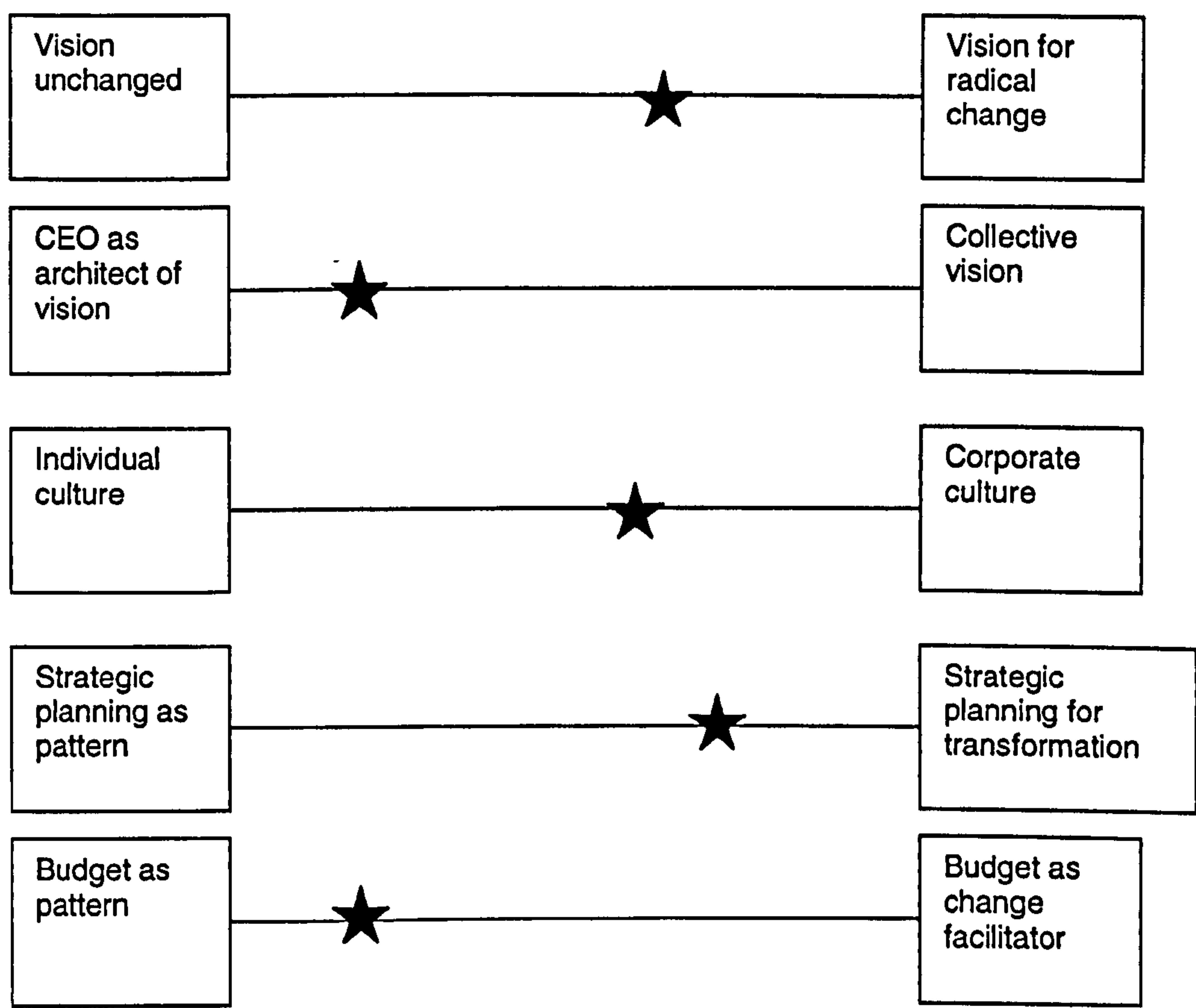
The high level preparation of the vision and strategic statements fits in with this analysis, because the strategy at this level is simply not part of the individual thinking of staff. It is not of concern to them, and indeed even the vice principal declared:

'Personally, I am not a fan of strategies. Nobody reads them. ...It's not at all clear what their actual functions are and are people really supposed to look at this strategy before they do anything because if so they certainly don't. The strategy really is regarded as more beyond a joke, really'.

The principal is seen, by and large, as another individual whose responsibility is to draw up a strategic plan for the funding council. However, the principal has introduced some desire for a move towards a more blended learning environment in the institution, and there is external pressure in this direction, both from the market and the funding council. The reaction to this has been to create smaller strategies which address some of these issues, and to put in place the systems required for blended delivery.

The institution appears to be happy to accept marginal, incremental change which fits with its basic intention to carry on as before. This may, however, be an appearance created by the small number of interviewees. None the less, this approach does put enormous pressure on those individuals who work in areas of innovation, because they work in a system which caters for individuals as and when they need assistance, rather than with planned change.

Institution 2



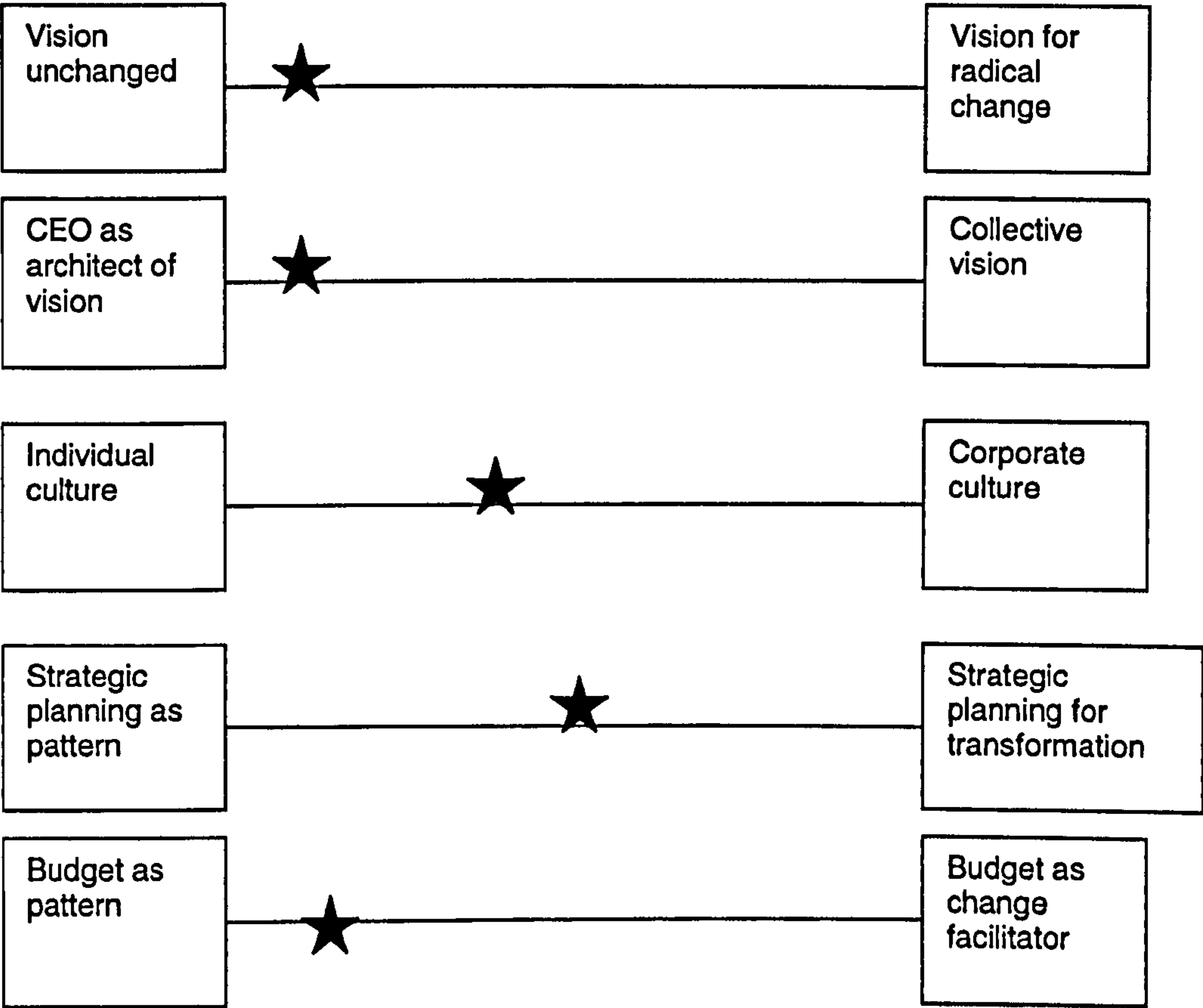
This institution shows the most discomfort. As noted in the results section, a large part of this is related to the fact that senior management has chosen not to focus on the real reasons for making changes when communicating with staff.

However, we might expect the kind of distrust we noted in the results from looking at the model. In a culture which readily admits to accepting many features of new managerialism and the participative leadership style that requires, the fact that the principal and senior management are the main

architects of the vision and goals with little consultation is bound to cause at the least lack of ownership, at the worst distrust.

There is also enormous frustration in the fact that there is vision for fairly radical change (the senior management participant in the sample declared that 'It's supposed to be a step change....'), but the planning and budgeting systems are not aligned with this. There is confusion between the institutional strategy, which seems to be a political document with little relevance, and the internal strategy documentation which points to targeted changes. The combination of a more corporate culture with a non-facilitative strategy and budgeting process means that individuals are trying to cope with too much to deliver despite the system. This may also be the root of the constant reorganising of appointments which is noted in the results section – where staff are simply unable to prioritise or say no to certain activities. It is in this environment that people are becoming disillusioned and tired, and finally anarchic. At this point, they simply do not do what is asked of them, although in this institution, it seems they do not go as far as actively undermining initiatives.

Institution 3 could be plotted thus:



In institution 3, there is a culture which includes elements of the political and collegial, planning is moving along the continuum from pattern towards a more negotiated, although it is at the institutional level still seen to be a process to fulfil external requirements. Budget is still very close to pattern, but also seems to have moved a bit towards the middle, and the planning process is devolved to schools which are the main budget holders. However, the vision element is unclear. As noted in the interview evidence, statements of vision are very general and are no different from what they were some years ago, and there is no sense of participation in creating these. This is out of kilter with most other

activities which are done in a decentralised and sometimes collegial way. There is some recognition of the problems in the institution, as the director of planning, in fact, stated that 'we need to piece that together to get a more consensual model of development'. This may cause additional discomfort in that the senior management are trying to move the strategic planning process to a more consultative one, but this assumes far more institutional coherence than the culture allows. In addition, the lack of mechanisms to collect together emergent strategy from the very individual schools is a problem.

Interviewees felt that they had no guidance on what the institution wants to be and exactly where it is going. This causes discomfort in the institution – and one of the ways in which this is made manifest is in the extreme fragmentation of the institution. This institution is harder than the others to plot in any kind of overall way because of this. At the level of activity, people feel immobilised and unsure of whether to participate in innovations such as the VLE because they are not sure whether their efforts will be wasted. In some cases there is an anarchical reaction which is related to the political nature of the culture and the lack of collective visioning and goal-setting and manifests itself in the way in which, as some participants noted, some decisions are actively undermined by staff.

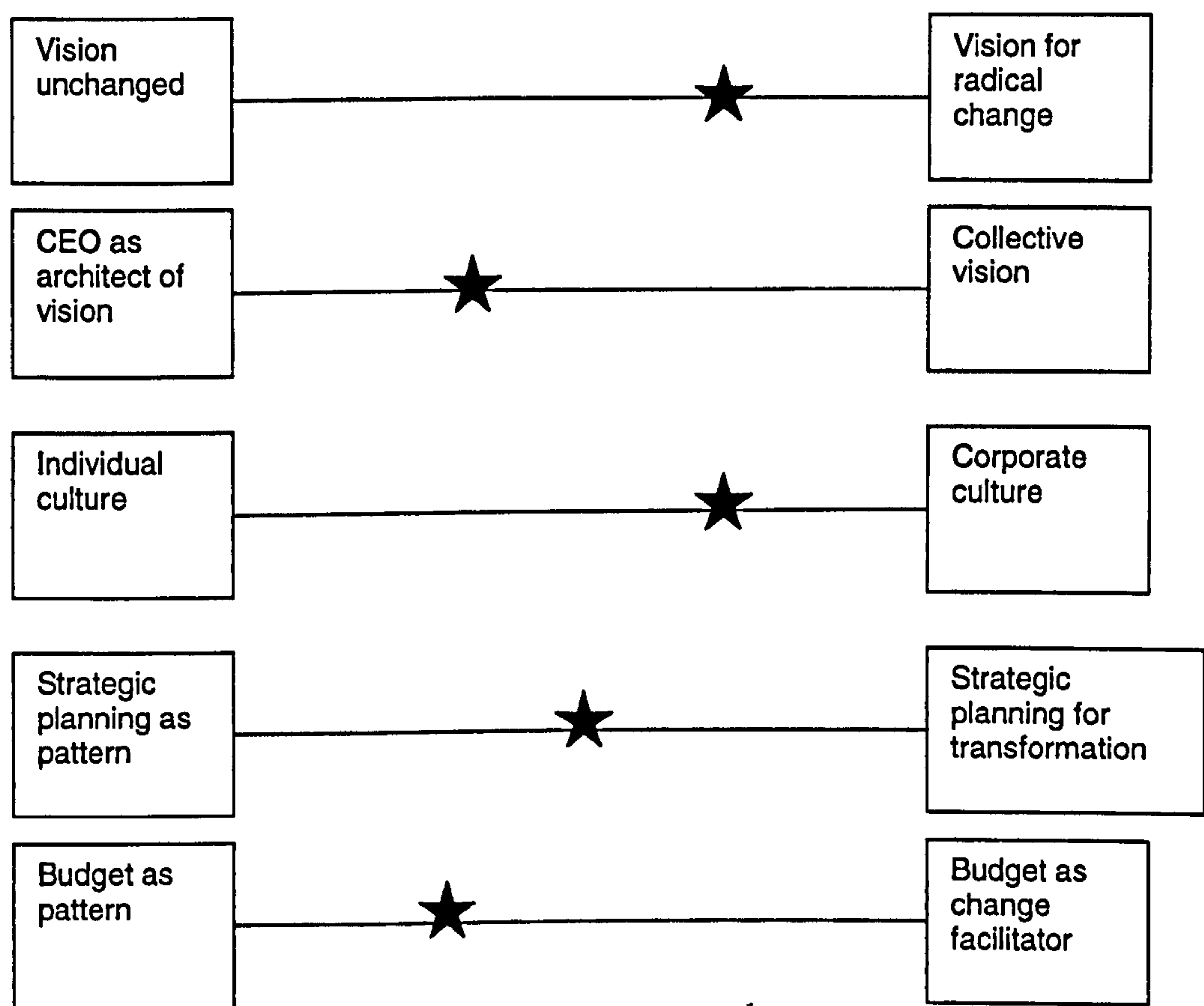
There is a sense that change is needed, for competitive and financial, if not teaching and learning reasons: '...our whole IT provision and our CME models have definitely become just average, we need to do some work...', but exactly what this should be and in what directions is unclear. The planning director felt that in the case of blended learning, for instance, the strategy was '...not a step change. It is a significant incremental restructuring.' While this may not put it very far along the strategy continuum, this level of change is still out of line with the unchanged vision for the institution. The discomfort this causes is evident from the interviews in that individual schools feel the pressure of the need for change and are going about making changes within their schools. This

gives rise to even more fragmentation in the institution, and may make it difficult to retrieve any kind of institutional strategic benefit in terms of improved image and market perceptions, as well as economies and efficiencies which the financial situation seems to warrant.

The lack of clarity on the vision led a number of interviewees to say that they felt there should be far more of a steer from the principal or the senior management group. However, if the model holds, this would merely create a different kind of discomfort in the institution, as this would not fit with the more collective focus in other areas. None the less, a vision to form the framework for decision-making and planning is needed, and would probably best be created collectively in order to give ownership in a decentralised organisation. The fact that budget is primarily pattern in this organisation does not seem to have caused much discomfort yet, quite possibly because the direction and therefore actual strategies for change have not yet been identified, and so departments and schools are not putting forward plans which require radically different budgets.

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Institution 4 could be plotted thus:



In institution 4, the vision is for change quite far on the right of the continuum, the culture is also quite far on the right, being perceived by many participants as entrepreneurial and customer driven. Indeed, the planning process, being well-negotiated, also fits towards the right end of that continuum. However, the budget process still seems to follow more of a pattern. This misalignment causes considerable discomfort and frustration in the institution – people with genuine ownership of the vision, goals and plans feel that they are not able to achieve them because of resourcing issues.

The recent more ‘directive’ involvement of the new principal and vice-principal have also caused some discomfort and confusion and a certain amount of

resentment within the institution – this would be a result of combining directive statements with the highly negotiated process of planning. Indeed, there has been this year a move of the negotiated planning process back towards the less negotiated. This move might align the influence of the senior management more closely with the planning process, but would lead to less ownership of the vision and goals than there currently is. The misalignment of the planning process with ‘dictats’ from the top leads to the feeling noted earlier that there is an hierarchical aspect to the management which does not sit comfortable with a primarily entrepreneurial culture. This may be a particular manifestation of the year of change brought in by the new principal, but thereafter, the vision-making process will need to be carefully managed so as not to unbalance those areas which are aligned.

The dynamics of the model

As demonstrated by institution 1, there is no assumption that there *needs* to be a shift along the continuum. In times of relative stability, when the financial situation is stable and/or the external environment is not presenting institutions with significant required change, as long as the institution has achieved alignment of the internal factors, it will remain relatively harmonious. However, as the evidence from the interviews shows, there are numerous drivers and tensions both internal and external to institutions which cause their vision to move towards change. As soon as this happens, the other factors will cause discomfort and shifts will need to happen. The amount of discomfort will depend upon how radical the vision is and how fast it is to be fulfilled.

As shown in the literature review, organisational culture is the slowest and most difficult factor to change. However, from the model this seems a more simplistic idea than might initially be thought. A lot of energy and time is spent dealing with the discomforts caused by misalignments between all the factors. If these were aligned, measured and steady progress might be more quickly made

in shifting towards the desired change. This more complex alignment of a number of factors in moving towards a change echoes the configuration school of strategy formulation as presented in Mintzberg *et al.* (1998).

What about structure and management style?

The above-mentioned factors do not fall neatly into continua which could be fitted into the model. They seem to be single points, rather than moving in any direction on a sliding scale. However, it does seem from the analysis of the four institutions studied, that structure and style have the potential to be magnifiers or minimisers of discomforts shown up in the model. For instance, in institution 3, discomfort shows up in the misalignment of the vision, culture and strategy continua. This leads to schools taking it into their own hands to make changes they think appropriate or oppose ideas which they feel may not be going anywhere. The structure of the institution, with its strong independent schools and its central services being seen in a subservient role to them, magnifies the effect of this, creating an extremely fragmented environment.

In the case of institution 2, there is a misalignment of the culture and the power of the senior management to create the vision and goals independently of the collective. This causes distrust and lack of ownership of the strategies in the institution. This is exacerbated by the management style, which is seen as coercive rather than rational, to the point where staff appear to be disempowered and disillusioned.

In institution 4, there was some disagreement on the structure, although it seemed to be mostly hierarchical as far as procedures were concerned. The discomforts felt here were primarily to do with the budget process not facilitating changes, and this may be magnified by the contrast between a structure with a great deal of concentration on procedure, and a culture which focuses on the entrepreneurial and innovative. In addition, there was a

mismatch between a move to the left of the continuum of the senior management control over the vision and goals and the culture of the institution. Here, the management style of consultation and working with the culture, winning hearts and minds, appears to have minimised the potential discomfort, with people being prepared to give the senior management the benefit of the doubt in a transitional period. This is in strong contrast to institution 2, where, although the circumstances are similar, with a new principal in post, the coercive style has magnified the problem and caused people to lose faith in the new management.

Implications of the model for institutions

As has been demonstrated, none of the institutions is completely immune to the changes which the idea of blended learning has brought about. These changes are the result not only of external pressures from government and indeed students themselves, but also of internal factors such as the need for financial efficiencies and to some extent the enhancement of the learning experience for students.

Because of its potential (whether or not this is the implementation model that is eventually followed) for creating a radical revision of the way in which teaching and learning is practiced, resourced and administered, blended learning can be used to provide us with a broad view of many of the procedures and functions of the institution. It can provide an angle from which to view the highest strategic functions to the most detailed operational tasks, such as record-keeping.

Through this prism, it appears that as different as they appear to be on the surface, institutions are adopting many similar approaches and strategies to the incorporation of blended and distance-learning aspects in their delivery modes. Each institution, however, being at a different stage of their introduction of

these ideas, is focusing on slightly different aspects of the process, and each is experiencing different problems in bringing its strategies to fruition. While some have taken a more managed approach to resolving this than others, none appears yet to have been entirely successful in fulfilling its goal. No interviewee felt that they had achieved this. Those who felt that the right strategies were in place said that a great deal of time and effort was still needed to reach their endpoint.

The wealth of data gathered during the course of this research has led to the creation of a model which can help institutions to identify the problems which might bedevil the introduction of a change such as blended learning, whether that be at a radical or modest level. The interview evidence shows that it is not only institutional culture which is the stumbling block to change. Hence, the model brings together vision, the originator of the vision, the institutional culture, the strategic planning process and the budgeting process in complex combination to allow senior managers to identify possible areas of discomfort in the institution – or to explain areas of existing discomfort which are hindering movement of the institution towards a particular goal.

As long as the vertical line created by the plot of the institution's characteristics on this model remains true, aligning the abovementioned factors, there is little discomfort in the institution. However, when any part of the vertical axis goes out of true, discomfort results. These discomforts are different depending on the factor which is out of true. It also seems that the solution to the discomfort may not necessarily be obvious, and will need to take into account the positioning of the vertical line, so that any strategies to solve the problem do not put other factors out of kilter and merely create a different kind of discomfort.

In terms of the dynamics of the model, a clear, medium- to long-term vision for the institution is important in creating stability which will reduce the impetus along the vision for change continuum. This allows for controlled alignment of

the other factors and then a shift towards the change with the minimum of disruption and less likelihood of anarchical effects. In this way the model articulates some of the ideas of the configuration school of strategy formulation.

The model has implication for some broad strategies, such as the SFC process of providing seed monies to institutions which work in partnership. This is an attempt to focus on shifting the culture towards blended learning, but this strategy assumes that the failure to adopt blended learning whole-heartedly is the result simply of a culture problem which is common to all institutions. This might be true at the more micro-level of the teaching and learning culture, but as we have seen, there is a complicated interrelationship among far more factors than merely this to bring about successful change. And the issues being faced by one institution may be very different from those being faced by another although the outcome (slow or non-adoption of a particular change) may be the same.

This model can potentially be used in contrasting ways. It may be of benefit as a predictive tool indicating to management where the introduction of an initiative is likely to encounter problems. On the other hand, it can be useful as a diagnostic tool where the introduction of an activity is not being taken up as expected. It should also be noted that while the introduction of blended and distance learning has been the catalyst for the original research, the broad model developed could be of benefit when planning other strategic directions, for example wider access policies or the introduction of changed teaching and learning methods to counter plagiarism. While the model has been developed here at an institutional macro level, it may also be useful at a micro level for specific departments planning to introduce new activities.

Further research opportunities could be found in testing the diagnostic or predictive potential of the model (in the latter case an action research approach may yield interesting results) or its applicability to other initiatives as noted

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above. In addition, there is the possibility of exploring further factors which emerged unexpectedly, such as budget/resource allocation and how it is related to strategic planning, the separation of teaching and learning culture and institutional culture, and the separation of hierarchy and line management.

As noted previously, there is subjectivity in the way in which institutions are plotted on the model and further research may assist in calibrating the continua more tightly. Finally, it would be of benefit to develop or report on institutional solutions to particular discomforts within the framework of the model – those that work and those that throw another dimension out of kilter, as suggested in the later stages of the discussion on institution 3.

The framework developed in this thesis provides the basis of a tool which can be refined to aid institutions in identifying and putting in place management solutions which enable the successful introduction of strategic change initiatives.

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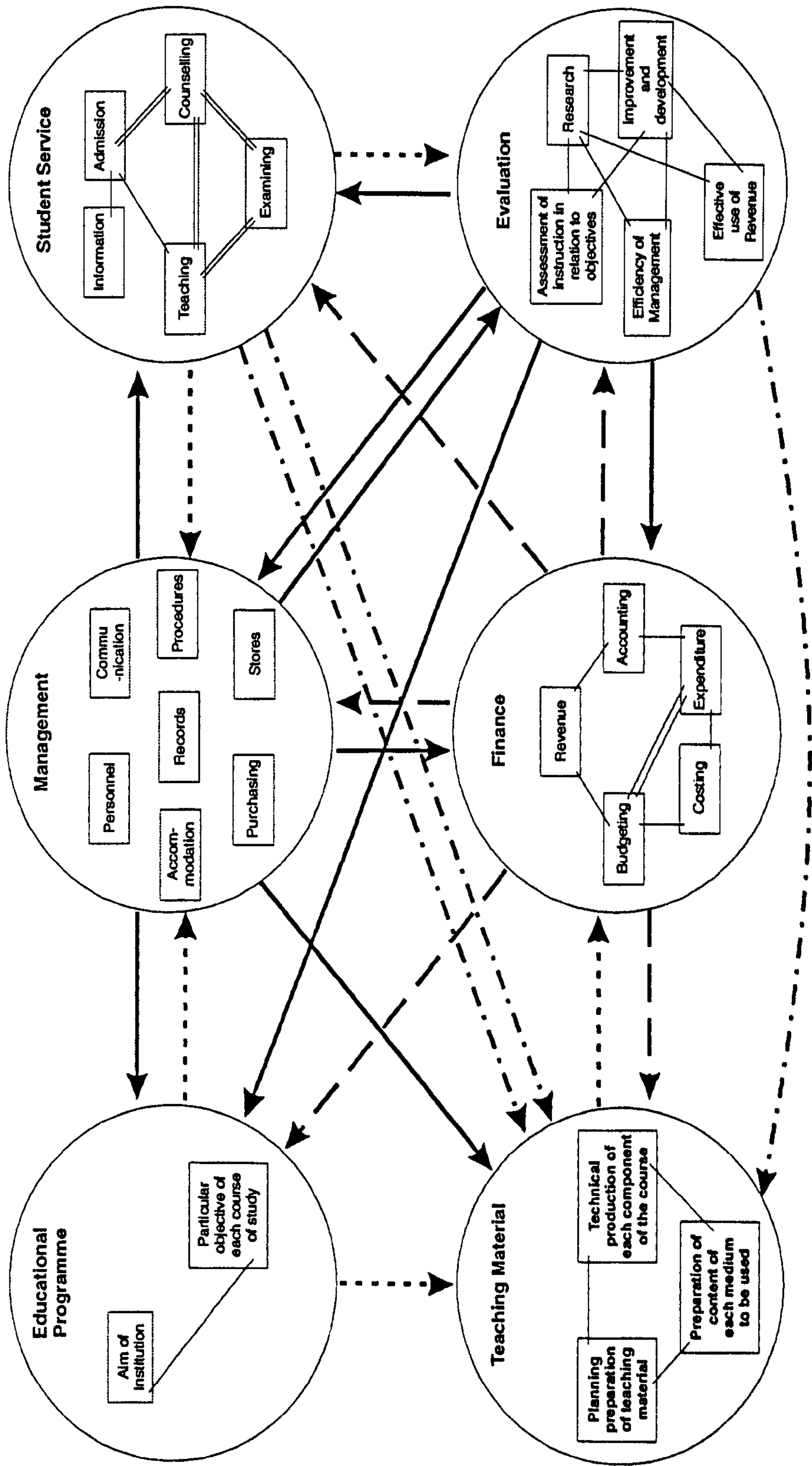
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Appendix 1 – The system of distance education

The system of distance education



Source: Erdos 1975b: 11 quoted in Holmberg 1989, p.29

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Appendix 2 – Generic version of letter to principals

11 Quality Street
Edinburgh
EH4 5BP
Current date

Prof. XXXXX
AAA University

Dear Prof. XXXX

Re: Doctoral research

A couple of years ago, YYYY in the Department of ZZZ was kind enough to assist me with a pilot investigation towards a doctoral thesis on institutional management and flexible learning, for which I was most grateful.

The focus of the research and the way in which it will be conducted has firmed up considerably since then. The working title of the thesis is now: 'Managing universities in transition: moving from traditional classroom-based delivery to blended and distance-learning approaches'. It has been decided that the research will take the form of case studies of how three different institutions are reshaping their teaching and learning and how the management and staff are approaching this reshaping. The case studies will be achieved by interviewing 12 members of staff at each institution, drawn from the full spectrum of activity – management, academic, academic-related, technical, administrative, etc. The interviews will be supplemented by the staff involved completing an online questionnaire, as well as desk research from institutional documentation, and where possible observation of projects, meetings or other relevant activity.

It is in this connection that I am once again seeking your assistance, as I would very much like to include AAAA as one of the case-study institutions. If this seems to you at all possible, I would be most grateful if you could provide advice on acceptable procedures for arranging interviews, and sources of documentation or areas of activity which would provide insights.

I believe that this research will provide you with valuable information about any barriers in your institution towards adopting a more blended and flexible teaching and learning approach, and will

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also identify some of the methods which staff have seen as valuable in moving the culture towards successful adoption of new teaching modes. The research should also provide you with information on how staff view and interact with the strategic planning process within the institution. All of this has the potential to make a significant impact on the speed and sustainability of the change process. I hope very much that you will see the benefit in AAAA participating in the research.

I look forward to hearing from you in this regard.

Yours sincerely

Sally Anderson

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Appendix 3 – Information provided to each participant prior to interview

‘Managing universities in transition: moving from traditional classroom-based delivery to blended and distance-learning approaches’

Doctoral research – Sally Anderson

Research question: How do the vision, culture, management style and strategic planning process work together when a potentially significant change such as the adoption of blended learning is on the institutional agenda?’

Thumbnail background: The literature indicates that distance learning has traditionally been best served by an hierarchical, more bureaucratic approach allowing for quick decision-making and tight control; traditionally face-to-face UK higher institutions have adopted other approaches, for example the collegial model. Does this work with blended learning? Do effective blended learning approaches require a new management paradigm?

Research approach: Primarily a grounded theory approach. Data gathered by interview. Interviews will follow a semi-structured format over a period of approximately an hour. Interviews will be tape-recorded and subsequently transcribed in full. A full transcription can be made available to participants should they wish. Every effort will be made to ensure anonymity.

Illustrative questions: What are the current management structure and style of the institution?
How should the prevailing culture of the institution be described?
What are the strategic plan’s main stated aims for the institution in terms of teaching and learning strategy particularly with regards to blended and distance learning?
How does the strategic planning process work in the institution?
How well do you think the culture, style and structure of the institution’s management fit with *strategic aims for blended learning*?
If there is any mismatch, what change management *strategy is there in place to shift the institution* towards its goals?
Is it working?

Proposed personnel to be interviewed:

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Approximately 12 members of staff forming a cross-section of all those potentially involved in or affected by blended learning: management, academic staff at a number of levels, library staff, staff from computing, educational development, administration, resources, planning, etc.

Documentation: Background information from documentation, such as strategic plan, learning and teaching strategy, virtual learning environment report, etc.

Benefits: information on how the strategic planning process is viewed and used within the institution; potential identification of barriers to and/or successes in moving the institution towards achieving its goals in the blended and flexible teaching and learning area.

Appendix 4 – Coding List

QSR N6 Full version, revision 6.0.
Licensee: Unregistered.

REPORT ON NODES FROM Tree Nodes '~/'
Depth: ALL
Restriction on coding data: NONE

(1)	/Institutional culture
(1 1)	/Institutional culture/Mixed culture
(1 2)	/Institutional culture/Collegial
(1 3)	/Institutional culture/Anarchical
(1 4)	/Institutional culture/Political
(1 5)	/Institutional culture/Enterprise
(1 6)	/Institutional culture/Hierarchical
(1 7)	/Institutional culture/individual
(2)	/Style
(2 1)	/Style/Rational argument
(2 2)	/Style/hearts and minds
(2 3)	/Style/Coercion
(2 3 1)	/Style/Coercion/not coercion
(3)	/Structure
(3 1)	/Structure/Project Management
(3 2)	/Structure/Matrix
(3 3)	/Structure/Hierarchical
(3 4)	/Structure/Horizontal
(3 5)	/Structure/Mixed structure
(3 6)	/Structure/fragmented
(3 7)	/Structure/sep of line mgmt from structure
(4)	/Vision
(4 1)	/Vision/principal/snr mgmt
(4 2)	/Vision/Ownership
(4 3)	/Vision/understanding
(4 4)	/Vision/For change
(4 5)	/Vision/as pattern
(5)	/strategy
(5 1)	/strategy/top-down
(5 2)	/strategy/bottom-up
(5 3)	/strategy/towards vision
(5 4)	/strategy/as pattern
(5 5)	/strategy/proactive
(5 6)	/strategy/reactive
(5 7)	/strategy/smaller strategies
(5 7 1)	/strategy/smaller strategies/Teaching and
learning	
(5 7 2)	/strategy/smaller strategies/IT/knowledge
management	
(5 8)	/strategy/Participative
(5 9)	/strategy/middle out
(5 10)	/strategy/not clear
(5 11)	/strategy/for SFC
(6)	/Planning
(6 1)	/Planning/as pattern
(6 2)	/Planning/towards new vision
(6 3)	/Planning/Process
(6 3 1)	/Planning/Process/gaps
(6 3 2)	/Planning/Process/implementation loop
(6 4)	/Planning/linear

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(6 5)	/Planning/consultative
(6 6)	/Planning/negotiated
(6 7)	/Planning/as budget
(6 8)	/Planning/implementation
(7)	/Budget
(7 1)	/Budget/follows activity
(7 2)	/Budget/changing
(7 3)	/Budget/as facilitator
(7 4)	/Budget/past looking
(7 5)	/Budget/forward looking
(7 6)	/Budget/Tree Node
(8)	/Power
(8 1)	/Power/individuals
(8 2)	/Power/schools/depts
(8 3)	/Power/committees
(8 4)	/Power/financial
(9)	/Drivers
(9 1)	/Drivers/for inst. change
(9 1 1)	/Drivers/for inst. change/financial
(9 1 2)	/Drivers/for inst. change/market place
(9 1 2 1)	/Drivers/for inst. change/market
place/competition	
(9 1 2 2)	/Drivers/for inst. change/market place/student
driven	
(9 1 3)	/Drivers/for inst. change/growth
(9 2)	/Drivers/for blended learning
(9 2 1)	/Drivers/for blended learning/student demand
(9 2 2)	/Drivers/for blended learning/staff efficiencies
(9 2 3)	/Drivers/for blended learning/enhancement of
learning	
(9 2 4)	/Drivers/for blended learning/cost saving
(10)	/Principal
(10 1)	/Principal/influence
(10 2)	/Principal/leadership
(10 3)	/Principal/architect of vision
(11)	/Type of university
(11 1)	/Type of university/Statutory
(11 2)	/Type of university/Chartered
(12)	/Comparisons with other universities
(12 1)	/Comparisons with other universities/decision-
making	
(12 2)	/Comparisons with other universities/speed of
change	
(13)	/Strategies for change
(13 1)	/Strategies for change/seed-funding
(13 2)	/Strategies for change/champions
(13 3)	/Strategies for change/senior management steer
(13 4)	/Strategies for change/Strengthening of
pedagogic units	
(13 5)	/Strategies for change/Establishing efficient
systems	
(13 6)	/Strategies for change/Training
(14)	/blended learning
(14 1)	/blended learning/staff view
(14 2)	/blended learning/student view
(14 3)	/blended learning/as vision/goal
(14 4)	/blended learning/teams
(14 5)	/blended learning/catalyst for change
(14 6)	/blended learning/vs distance learning
(15)	/tensions and balances

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(15 1)	/tensions and balances/admin/academic
(15 2)	/tensions and balances/research/teaching
(15 3)	/tensions and balances/centre/depts and schools
(15 4)	/tensions and balances/individual/inst
(15 5)	/tensions and balances/subject discipline/inst
(15 6)	/tensions and balances/blended learning and f2f
(16)	/discomforts
(16 1)	/discomforts/with resource/budget
(16 2)	/discomforts/with senior management
(16 3)	/discomforts/with institutional direction
(16 4)	/discomforts/with pace of change
(16 5)	/discomforts/style and culture
(16 6)	/discomforts/lack of management expertise
(16 7)	/discomforts/communication
(17)	/infrastructure
(17 1)	/infrastructure/changes
(17 2)	/infrastructure/gaps
(18)	/Teaching and learning culture
(19)	/Barriers
(19 1)	/Barriers/resources
(19 2)	/Barriers/Time
(19 3)	/Barriers/Copyright

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Appendix 5 – Sample coded text with annotations

+++ Retrieval for this document: 51 units out of 526, = 9.7%
++ Text units 186-236:
Interviewer in bold

Ok, well can we have a think about strategic planning in the institution and how your perception of how the system works, and then what its goals are in terms of flexible and maybe distance learning, but I don't know, explain to me the difference.

187

We must have strategic planning...

188

(6) /Planning

<<Lack of involvement at lecturer level in str. planning process. Ownership?>>

189

(A) //Document Annotations

And we have long term plans and I've seen the indicators that are being used, and it's all - at university level, I have to say it's largely financially driven, that we're looking for more than a certain percentage

of funding coming from non standard sources or non government sources, we're looking to have a certain number of students, we're looking to have...you know, those are the type of things we're setting at strategic level.

190

(5 1)

/strategy/top-down

(6 7)

/Planning/as budget

<<Separation between senior mgmt and coalface. Finance prime driver. >>

191

(A)

//Document Annotations

In terms of style, then we're quite happy to subscribe to the buzz words.

192

(16 7)

/discomforts/communication

But there doesn't seem to be any genuine attempt at anything to explain what that means in practice.

193

(16 7)

/discomforts/communication

<<No translation of strategy into practical implementation. or not thought through practically>>

194

(A)

//Document Annotations

That the assumption is that at corporate level you set some really vague aims and then the faculties will present some slightly less vague aims, and then the departments will try to figure out what all that actually meant, and do something.

195

(4 2)

/Vision/Ownership

(5 1)

/strategy/top-down

(5 10)

/strategy/not clear

<<Feel the burden on depts. to translate into reality. No ownership>>

196

(A)

//Document Annotations

And... Yes, the departments have the job of making all this reality somehow.

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Yeah.

198

What tends to happen is the departments will then try to figure out what those things meant and whether or not they're meeting their requirements.

199

(4 2) /Vision/Ownership

(4 3) /Vision/understanding

They don't take it on board as a vision.

200

(4 2) /Vision/Ownership

(4 3) /Vision/understanding

They take it on board in terms of a set of things that they have to adhere to.

201

(4 2) /Vision/Ownership

(4 3) /Vision/understanding

Right.

202

But it's not a starter for ten, it's a sort of fait accompli?

203

Well we were told we had to do that, so we're doing it.

204

But we've got a set of students who are here from [outside of the UK] who are getting a lot of resources thrown at them because it's great, it's overseas funding.

205

Well why are we doing that?

206

We've got a member of staff looking after about 30 students full time, we've got other students on the same programme - there's 700 of them I look after, I'm not bitter.

207

But they are UK and European, so why is there this mismatch of resources and the simple answer is, ah, but we're supposed to be providing a certain percentage of our income from non-European sources, so this is trying to meet that.

208

(4 2) /Vision/Ownership

(16 3) /discomforts/with institutional direction

Now to me, that's not following a strategic plan.

209

(4 2) /Vision/Ownership

(16 3) /discomforts/with institutional direction

That's just trying to tick boxes.

210

(4 2) /Vision/Ownership

(16 3) /discomforts/with institutional direction

(5 11) /strategy/for SFC

Uh huh, and it's sort of denying the core business aspect in a way.

211

Well, yes, I mean, there's a lot of argument about whether it's an overlap, whether it's an additional layer or whether it's actually taking away from... I mean, for everything you can say on that side, there's somebody can come up with a contrary argument like it's adding additional

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culture into the classroom which is a good thing and so on.

212

I mean, it's difficult to know where the reality lies there, but the point is, in terms of what we're choosing to do, the university is being very vague and assuming that we will fill the detail, and what we're actually doing at departmental level, is trying to make sure we stay within the parameters of the vague things that have been set further up.

213

(4 1) /Vision/principal/snr mgmt

(4 2) /Vision/Ownership

(16 2) /discomforts/with senior management

<<Separation of senior management from rest of institution. Not part of institution which is seen as entity itself. (opp. of Greenfield). >>

214

(A) //Document Annotations

Now that's not driving us in a particular direction.

215

(16 2) /discomforts/with senior management

<<This gap means no real impetus. depts. just trying to stay out of trouble. Not moving forward>>

216

(A) //Document Annotations

Yes.

217

(16 2) /discomforts/with senior management

Ok, so there's no real sense of what the high heidyins ... The university

says we've to be more flexible in our provision.

218

(16 2) /discomforts/with senior management

Yes.

219

So it's then up to the faculties in the school to decide well, what does that mean.

220

I mean, at one point we were told that all our courses should be offered part time in the evening, and now that's long gone, but there was a time when we were told that's what should happen.

221

(5 1) /strategy/top-down

(16 1) /discomforts/with resource/budget

(19 1) /Barriers/resources

It didn't happen.

222

(5 1) /strategy/top-down

(16 1) /discomforts/with resource/budget

(19 1) /Barriers/resources

The resourcing wasn't there to have everything again in the evening.

223

(5 1) /strategy/top-down

(16 1) /discomforts/with resource/budget

(19 1) /Barriers/resources

<<Lack of coherence between stated goal and resource. Budget not following strategy. >>

224

(A) //Document Annotations

There are some evening courses, and there always have been but the fact that the university decided that was what we should be doing appeared to have no impact.

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(6 8) /Planning/implementation
 <<No follow through on strategy. ?Lack of senior management conviction?>> 226
 (A) //Document Annotations
 Now flexible I think is generally not taken to mean that, that at the moment flexible is talking about flexible learning materials.
 227
 (5 10) /strategy/not clear
 But it doesn't necessarily say that.
 230
 (5 10) /strategy/not clear
 You'll not find [flexible learning]
 231
 (5 10) /strategy/not clear
 in the strategic plan, I don't think.
 232
 (5 10) /strategy/not clear
 Well not in the last one, might in the current one, but certainly not in the headlines.
 233
 (5 10) /strategy/not clear
 But that's been seen as understandably I think the institution thinks well that's something we can bring in at corporate level and it could then be taken up at individual level by the schools and staff and therefore they're helping to provide an environment that allows us to become more flexible, but I think there is a difference between doing that, and choosing, in our case, to invest in Web CT.
 234
 It wasn't really a very full academic debate about whether Web CT was the best thing to go with.
 235
 It was kind of... it's almost as if to say right, I think you might want to do some flexible learning so in case you do, and by the way it's a good idea, here we've provided these tools.
 236
 (13 5) /Strategies for change/Establishing efficient systems

THE CD/DVD WHICH
ACCOMPANIES
THIS THESIS
HAS NOT BEEN
SENT FOR
INCLUSION
IN THIS
ELECTRONIC
VERSION

PLEASE CONTACT
THE AWARDING
INSTITUTION